Aid Management Platform

Version 1.12

USER MANUAL

Developed in Partnership with
OECD, UNDP, The World Bank and The Development Gateway

Aid Management Platform

A Product of the Development Gateway

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Documentation Complies with AMP Software Version 1.12 – Additional Release Notes may be attached in appendix for Version 1.12

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Software Requirements

AMP is best run on Internet Explorer 7.0 and higher or Mozilla Firefox 2.0 and higher.

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ABOUT THIS MANUAL

This user manual is intended to serve as a tool for understanding how to operate and understand some of the basic concepts of the AMP system. Included are definitions, examples and step by step directions that will assist you in using the software. **AMP is customizable software with the capability of catering to the specific needs of its users. Therefore, some of the terminology used in this user manual may not apply to your specific setup.** However, this manual's goal is to show you the full capability of the AMP system.

Typographical Conventions

Buttons are noted in blue and underlined – i.e. Preview

Hyperlinks are noted in blue – i.e. Preview

When using this manual you will find various tools to assist you. These tools are:

- AMP Tips – AMP Tips are written in green and will highlight useful tools that will enhance your use of the AMP system.
- Information Notes – Information Notes are useful notes that add to the explanation of various AMP features and often include requirements of the software. Normally information notes enhance your understanding of various AMP operations (differ from AMP Tips which focus on the use of AMP tools)
- Definitions – Definitions are noted in red and will define various terms that are used in AMP, especially when such fields are not defined in the general layout of the user manual.

Who Should Use This Manual

AMP Users	This manual will assist users of the AMP system to understand the functionality available to them and also the various features of AMP.
AMP Admin	The AMP Administrator will find this manual useful for understanding how the administrative portion of AMP (backend) ties in with the various user interfaces and functions

Welcome to AMP

The Aid Management Platform (AMP) is a Web-based application that enables better management and coordination of development assistance. Designed for use by governments and their development partners, AMP streamlines the processes for planning, tracking and reporting on aid flows (including sector/budget support, project support, and other aid modalities). AMP helps manage development resources according to national priorities and measure impact in line with the MDGs, and was specifically designed to support progress toward Paris Declaration objectives. AMP also promotes the International Development Markup Language (IDML) initiative, which is advancing the use of open standards globally.

AMP comprises eight main features which can be customized to meet the specific aid management needs of each partner country:

- Aid Information Management
- Customized Reporting
- Monitoring and Evaluation
- Messaging
- Resource Management
- Planning Calendar
- Project Costing
- National Planning Dashboards

AMP puts all the pieces together:

- Pulls data from multiple sources, so that project managers have all the information they need in an easily accessible workspace
- Consultative implementation process brings stakeholders together – data producers and data users – to brainstorm on how to collaborate more effectively
- Technical requirements flow from identification of procedural bottlenecks, rather than technology driving the process
- Partnership-based approach focuses on capacity building, sustainability, and government ownership

How AMP Works

AMP is designed to alleviate the need for paper based activity and project management. Once the proper data is entered, AMP can serve as a powerful reporting tool along with an efficient way to track links and documents associated with each activity and/or project. Included in this functionality is the ability to identify quickly how activities and/or projects are measuring up to desired goals and projections.

The AMP Process follows the following workflow:

1. Enter Projects/Activities into the Activity Module in AMP
2. Update the Module as needed when more information becomes available for the project/activity. This includes adding relevant documents and/or links related to the activity.
3. Create useful reports based on the projects and/or activities you have entered into AMP. Using report tools such as filter and date range you can quickly get a managerial or work level overview of the activities and/or projects you have stored in AMP. For example, you can quickly filter all projects by a particular sector and use the date range to see amounts committed to those projects across a year range. Export the report to excel for further manipulation and/or calculations.

* In addition to creating useful reports, AMP can also store documents and links relevant to a particular team's operations. Also, utilize the power of the Calendar to set appointments and reminders for upcoming events and tasks.
* Quickly send messages to fellow team members using the messaging system in AMP.
* For graphical views of the status of activities and/or projects and their relevance to various national goals and earmarks – you can view an overview via the Dashboards Section.

AMP is designed in a way that allows teams to view and manage information quickly and even make documentation available to public for viewing and tracking where the management team decides to do so.

Understanding AMP Permissions

A key to using the AMP software is understanding the role of permissions within the software. Permissions are a key feature of AMP and define the limitations you have within the software based on your assigned role. In addition, understanding permissions will help you to realize the limitations that will impact your usage of the software depending on your workspace role.

The first step to understanding permissions is getting a clear understanding of the three tiers of user's rights within AMP. These three tiers are:

1. User Role.
2. Workspace Type
3. Role-Based Permission

From a high level view, the way these work together is as follows:

1. A user must belong to a workspace to gain access to AMP features.
2. Within the workspace a user must be assigned a role.
3. Within the role a user has activity field level permissions.

Let's begin with the first level of this tier → A user's role within a workspace.

Workspace Types

So, each user must be assigned to a workspace. But what is a workspace? A workspace is the common place used by members of a team. Within AMP, there are two particular types of workspaces, a Management Workspace or a Team Workspace. Let's define the differences.

1. Management Workspace
    - A Management workspace must have at least one Child workspace. When the Management workspace has a Child workspace, the Management workspace is then referred to as the Parent workspace.
    - A management workspace can be a Parent workspace for any type of Team workspace (Computed and/or Non-Computed). However, a Management workspace cannot be the Parent of another Management workspace.
    - Management workspace members can view the projects/activities of its Child workspaces. However, there is a limitation.

Management workspaces can only view **validated** NEW activities from Child workspaces. This only applies to NEW activities that have never been validated. Any other activities that have been validated previously but may be edited and awaiting a new validation for the edited portion – these are available for view by the Management workspace.

- Another rule to note is that Management workspaces cannot view draft activities from Child workspaces.

2. Team Workspace
   Team Workspaces are divided into two categories
   - Non Computed
     A non computed Team workspace facilitates creation and editing of activities, reports and desktop tabs. Non Computed Team workspaces can view activities that assigned to the workspace.

   - Computed
     A computed Team workspace allows for automatic population of the workspace with activities from other Team workspaces based on certain criteria. Computed Team workspaces can create activities if the option is checked in the workspace manager section of AMP. Computed Team workspaces can also edit activities.

Understanding the rights assigned to a workspace type and the various workspace options is important because it ties in with the rights of a user within a workspace. Let's now take a look at how a user's rights are defined within each workspace.

User Roles

So, after creating your workspace, you now need to add users to the workspace. Within AMP there are three classes of users:

1. Workspace Manager
2. Workspace Member
3. Public User

The rights of each user within the workspace is dependent FIRST on the workspace type and then SECONDLY on their user role in the workspace. Let's define the parameters for each of the three classes of user roles in AMP.

1. **Workspace Manager**
   As the name suggests, this is the highest user level within a workspace. There can only be one workspace manager per workspace that is created. (Within AMP you can create several different workspaces). However, the same user can be a workspace manger and a workspace member of a different workspace. (Note: In the workspace where the user is a workspace member, the user will only have workspace member rights. The user will only have Workspace manager rights in the workspace where the user is a workspace). A Workspace Manager has the maximum amount of rights within a workspace. (For more information on the rights of a Workspace Manager see page x)

2. **Workspace Member**
   A workspace member is the other role for a logged in user of AMP that is not a workspace manager. There can be more than one workspace member within a workspace. Also a user can be a member of multiple workspaces. A workspace member can be the workspace manager of a different team. (For more information on the rights of a Workspace Manager see page x)

3. **Public user**
   This user does not have a valid login to AMP and can only access documents, reports and projects/activities made public by the workspace manager of an AMP management workspace. (Information Note: Only the workspace manager of a management workspace can make documents available for public view)

Take a look at the chart to get a good overview of the rights/permissions available to a user based on their workspace role and the workspace type.

User Role: Workspace Manager

Management Workspace

1. Can create public reports and desktop tabs
2. Cannot create or edit activities
3. Cannot view NEW activities that are not validated activities until the activity has been validated by the workspace manager of the workspace in which the activity was created.
4. Once the activity has been validated for the first time the workspace manager can view activity edits that have not yet been validated in the workspace where the activity was created.
5. Cannot view draft activities created in the child workspaces.
6. Can assign/un-assign reports to the team via the team workspace setup.
7. Can view all the fields in the activity channel overview irrespective of the users role in the activity

Team Workspace (Non Computed and Computed)

1. Can create activities (the option to create activities in computed workspace will be based on the option selected in the workspace manager section of the admin).
2. Has Super-User permissions i.e. can edit any activity, and view/edit ALL fields of that activity (turned on in the feature manager), regardless of role in the activity
3. Has full rights to modify the workspaces setup in the workspace info module (for more information on the workspace info module see page x)
4. Can assign and un-assign activities and reports in the workspace to team members.
5. Is responsible for validating new activities and edits to existing activities
6. Can set a default tab for the workspace so that new members can view activities via the default desktop without the need of creating a tab to view the activity.

User Role: Workspace Member

Management Workspace

1. Cannot create public reports and documents
2. Cannot edit or create activities
3. Does not have access to the team workspace setup features.
4. Cannot view NEW activities that are created and not validated

activities until the activity has been validated by the workspace manager of the workspace in which the activity was created or edited.
5. Once the activity has been validated for the first time the workspace members can view activity edits that have not yet been validated in the workspace where the activity was created.
6. The fields that the user can view in the activity depend on the activity level permissions and the user's role in the activity.

Team Workspace (Computed and Non Computed)

1. Can create and edit activities.
2. Can view activities based on the role of the member in the activity. Of course if the user is the creator of the activity he/she can view all the fields by default unless otherwise specified in the role based permissions on the activity.
3. Cannot validate changes to activities. Any change done by the team member to an activity has to be validated by the workspace manager of the workspace where the activity was created
4. Does not have access to the team workspace setup features.
5. Can edit draft activities and un-validated activities of other users within the same workspace based on the user role in the activity.

User Role: Public User

1. User does not belong to a workspace and does not have a valid login to access the AMP features.
2. Cannot create or edit activities
3. Can view the activity preview via public desktop tab(s) based on the permission set for the user in the activity level permissions.
4. Can view public documents and reports.

So, now that we have an understanding of how a user is defined within a workspace, let's visit the next level of rights and permissions – Project/Activity level rights and permissions which are defined as Role Based Permissions.

Role-Based Permissions

Overview of Project/Activity Rights and Permissions

The final level of rights refers to the permissions given to a user to edit and/or create project/activity data. So, FIRST you have chosen the type of workspace, SECOND you have a defined user role in the workspace, now the FINAL thing that needs to be done is to define the rights a user has to create and/or edit project/activity data.

With all this discussion of Rights and Permissions you may wonder how Project/Activity Permissions differ from Workspace Permissions that we just discussed. Especially since projects/activities are created within workspaces. So, here is the difference:

1. **Workspace Permissions** are the user's rights within a workspace and are defined by user roles such as Workspace Manager and Workspace Member.
2. **Activity Permissions** are related to the rights a user has within an activity. In particular those rights are based on the fields in the activity and consist of the right to Read and/or Edit certain fields.

Information Note: An exception to the rule is the user defined at the workspace level as Workspace Manager. This Workspace Role will be given inherent rights to have **full control** of any project/activity within their workspace.

Overview of AMP Projects/Activities Workflow

Before digging into the details of role-based permissions, let's examine how the process of activities/projects works. Below is the overview of an activity/project workflow.

1. Activities are created in any workspace that allows it.
2. Once they are saved, the Workspace Manager of **that** workspace must validate the data.
3. Once validated, the activity appears in other workspaces, as relevant:
    a. Parent workspace (workspace type=Management)
    b. Computed Workspace for which criteria are met.
    c. Public View
    d. Or, it can be manually assigned to additional workspaces.
4. The activity can belong to/be edited by an unlimited number of workspaces. Whether specific users can edit the activity depends on role-based permissions.

When an activity is edited, the flow begins again IF the Workspace Manager has opted to validate every change (otherwise, he only validates the activity's creation, and afterward there is no check before the changes flow into other workspaces/Public View).

Understanding Role-Based Permission

Role based permissions are strictly related to the fields that a user can view and/or edit within the project/activity form. Each field of the project/activity form has view/add/edit/delete rights associated with it. The ability to perform any of these functions on the field is based on the permissions given to the user's role for that particular field.

Before moving forward, let's define what we mean by the term "role" within an activity. It is important to note that roles are based on a group and not on the individual user. This is the key defining feature of role-based permissions. There are eleven possible roles in an activity/project. These are:

<table>
<tr><th>Role</th><th>Definition of Role</th></tr>
<tr><td>Everyone</td><td>Defined as public access (not logged into AMP i.e. public view)</td></tr>
<tr><td>Guest</td><td>Defined as a user that is logged in but is a workspace member that has no role. (By role, this means they are not part of any other defined Permissions Role such as Beneficiary Agency or Sector Group, etc) This can be viewed as the general user logging in to AMP.</td></tr>
<tr><td>Owner</td><td>This is the creator of the activity and by default has rights to all the fields unless otherwise specified.</td></tr>
<tr><td>Group</td><td>The user will inherit the rights of groups/agencies based of the role of the user in an activity. (i.e. this means that a user can be owner of one activity but can be the Beneficiary agency of another activity) Also these permissions may vary from one field to another in an activity.
The possible groups are:
<table>
<tr><td>Beneficiary Agency</td><td>Implementing Agency</td></tr>
<tr><td>Contracting Agency</td><td>Regional Group</td></tr>
<tr><td>Executing Agency</td><td>Responsible Organization</td></tr>
<tr><td>Funding Agency</td><td>Sector Group</td></tr>
</table>
</td></tr>
</table>

So, once a user logs into their workspace, the role based permissions are effective only when the user clicks to edit or view and activity. The user's *level of access* is defined on a *per-field basis* according to their *role in the project*:

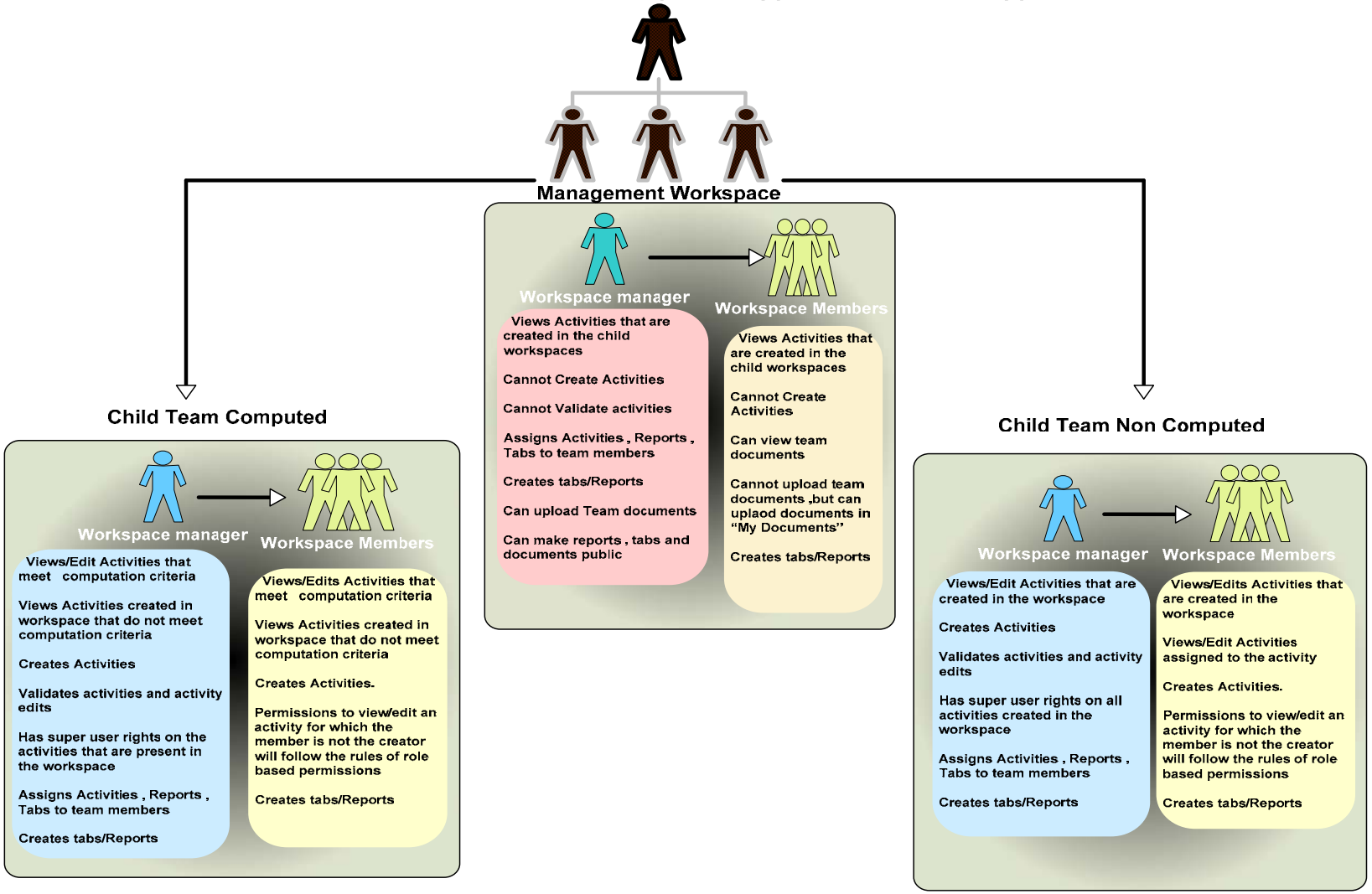
Levels of access are defined below:

- Field is invisible in Edit Activity Form AND in Channel Overview/Preview/Printer Friendly
- Field is invisible in Edit Activity Form and is visible in the Channel Overview (Read-Only access)
- Field can be viewed and edited

The permissions for each role are set in the Feature Manager by the Administrator in the Admin Portal of AMP. The Feature Manager tree lists all fields in AMP. (For more information on the Feature Manager and the Admin Portal of AMP see the Administrator's Manual for AMP) Each field has an option for setting permissions. The Permissions setting popup can be seen below.

From a user perspective it is important to remember that permissions are set on a **per-field basis**.

Overview of AMP Workspace Types and User Types

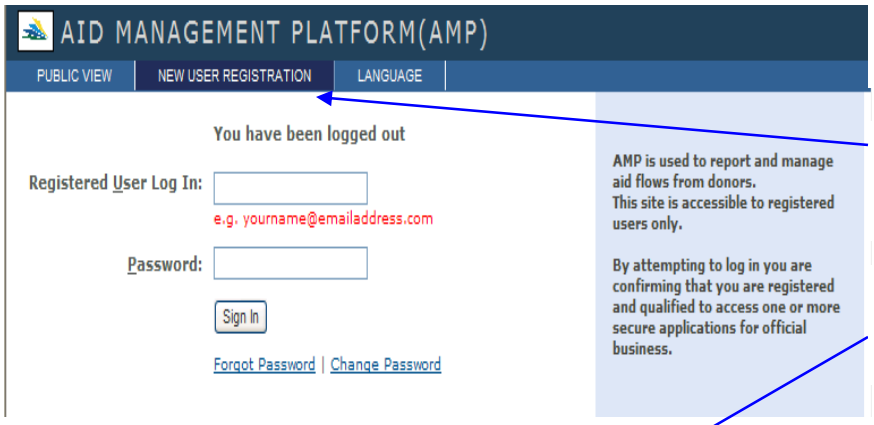

Management Workspace
Child Team Computed
Workspace manager
Workspace Members
Views/Edit Activities that meet computation criteria
Views Activities created in workspace that do not meet computation criteria
Creates Activities
Validates activities and activity edits
Has super user rights on the activities that are present in the workspace
Assigns Activities , Reports , Tabs to team members
Creates tabs/Reports
Views/Edits Activities that meet computation criteria
Views Activities created in workspace that do not meet computation criteria
Creates Activities.
Permissions to view/edit an activity for which the member is not the creator will follow the rules of role based permissions
Creates tabs/Reports
Workspace manager
Workspace Members
Views Activities that are created in the child workspaces
Cannot Create Activities
Cannot Validate activities
Assigns Activities , Reports , Tabs to team members
Creates tabs/Reports
Can upload Team documents
Can make reports , tabs and documents public
Views Activities that are created in the child workspaces
Cannot Create Activities
Can view team documents
Cannot upload team documents ,but can uplaod documents in "My Documents"
Creates tabs/Reports
Child Team Non Computed
Workspace manager
Workspace Members
Views/Edit Activities that are created in the workspace
Creates Activities
Validates activities and activity edits
Has super user rights on all activities created in the workspace
Assigns Activities , Reports , Tabs to team members
Creates tabs/Reports
Views/Edits Activities that are created in the workspace
Views/Edit Activities assigned to the activity
Creates Activities.
Permissions to view/edit an activity for which the member is not the creator will follow the rules of role based permissions
Creates tabs/Reports

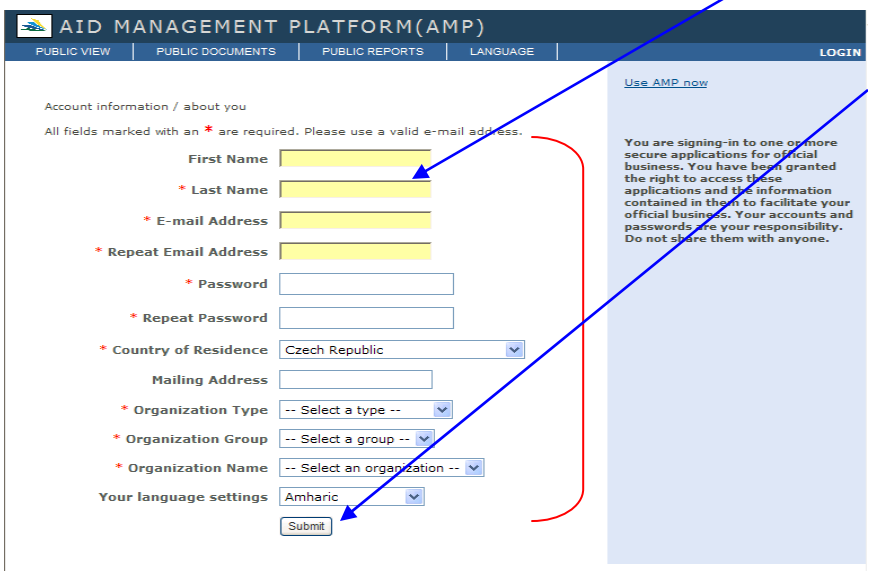
GETTING STARTED

To get started as a user of AMP you must have a user name and password. In order to create your user name and password, you will need to follow the process of registering as a new user. If at any time you forget your password or desire to change it, you can find the links for doing so on the login page of AMP.

Once you have created your user name and password, you still will need to be assigned to a workspace before you can use the software as a workspace member. The AMP administrator manages the assignment of AMP users to workspace(s). (For more information see Workspaces – pg n)

Registration


AID MANAGEMENT PLATFORM(AMP)
PUBLIC VIEW
NEW USER REGISTRATION
LANGUAGE
You have been logged out
Registered User Log In:
e.g. yourname@emailaddress.com
Password:
Sign In
Forgot Password | Change Password
AMP is used to report and manage aid flows from donors.
This site is accessible to registered users only.
By attempting to log in you are confirming that you are registered and qualified to access one or more secure applications for official business.


AID MANAGEMENT PLATFORM(AMP)
PUBLIC VIEW
PUBLIC DOCUMENTS
PUBLIC REPORTS
LANGUAGE
LOGIN
Use AMP now
Account information / about you
All fields marked with an * are required. Please use a valid e-mail address.
First Name
* Last Name
* E-mail Address
* Repeat Email Address
* Password
* Repeat Password
* Country of Residence
Czech Republic
Mailing Address
* Organization Type
-- Select a type --
* Organization Group
-- Select a group --
* Organization Name
-- Select an organization --
Your language settings
Amharic
Submit
You are signing-in to one or more secure applications for official business. You have been granted the right to access these applications and the information contained in them to facilitate your official business. Your accounts and passwords are your responsibility. Do not share them with anyone.

1. Enter your AMP URL – this will take you to the AMP Login Page

2. Click New User Registration

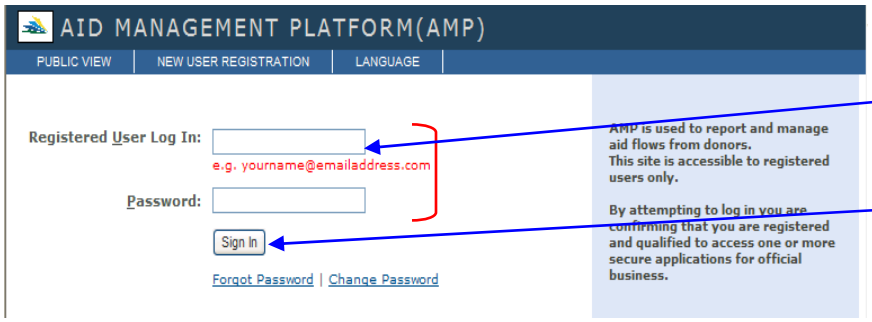
3. Fill out registration information (* = required fields)

4. Click Submit to finish registration process and submit information

5. Once the registration form is submitted, contact your AMP Administrator, who will then assign you to a team.

6. Once you have been assigned a team, you may login to AMP as a registered user

Logging In

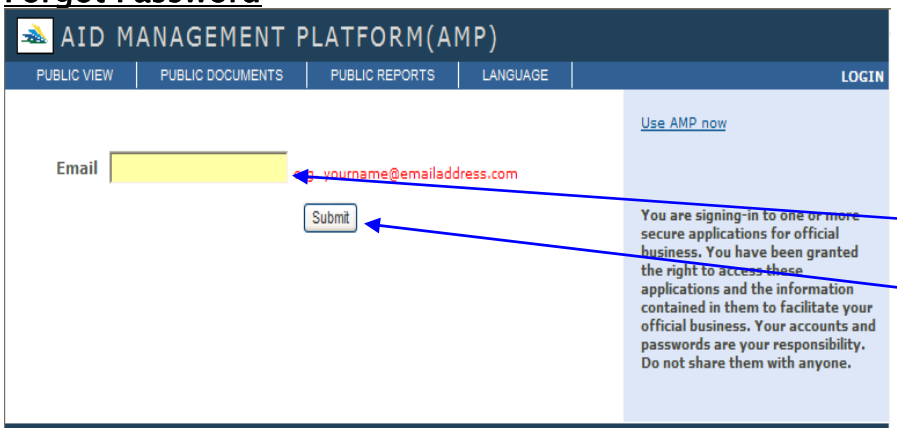

AID MANAGEMENT PLATFORM(AMP)
PUBLIC VIEW
NEW USER REGISTRATION
LANGUAGE
Registered User Log In:
e.g. yourname@emailaddress.com
Password:
Sign In
Forgot Password | Change Password
AMP is used to report and manage aid flows from donors.
This site is accessible to registered users only.
By attempting to log in you are confirming that you are registered and qualified to access one or more secure applications for official business.

1. Enter email address and password you used to register

2. Click Sign In to login to AMP

Password Management

Forgot Password

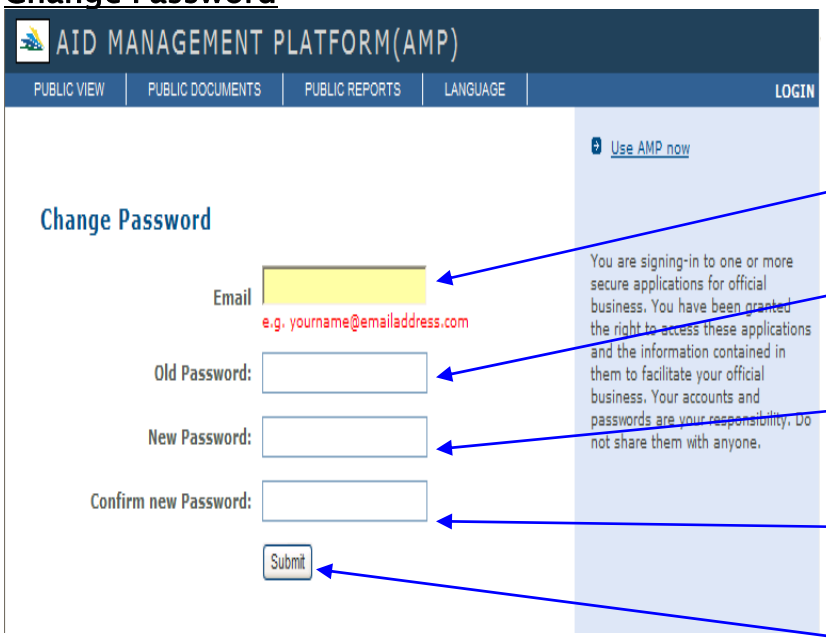

AID MANAGEMENT PLATFORM(AMP)
PUBLIC VIEW
PUBLIC DOCUMENTS
PUBLIC REPORTS
LANGUAGE
LOGIN
Use AMP now
Email
e.g. yourname@emailaddress.com
Submit
You are signing-in to one or more secure applications for official business. You have been granted the right to access these applications and the information contained in them to facilitate your official business. Your accounts and passwords are your responsibility. Do not share them with anyone.

1. Click Forgot Password on Login Page

2. Enter your email address so that your password can be emailed to you

3. Click Submit

Change Password


AID MANAGEMENT PLATFORM(AMP)
PUBLIC VIEW
PUBLIC DOCUMENTS
PUBLIC REPORTS
LANGUAGE
LOGIN
Use AMP now
Change Password
Email
e.g. yourname@emailaddress.com
Old Password:
New Password:
Confirm new Password:
Submit
You are signing-in to one or more secure applications for official business. You have been granted the right to access these applications and the information contained in them to facilitate your official business. Your accounts and passwords are your responsibility. Do not share them with anyone.

1. Click Change Password on Amp login page

2. Enter your login email address

3. Enter your old password

4. Enter your new password

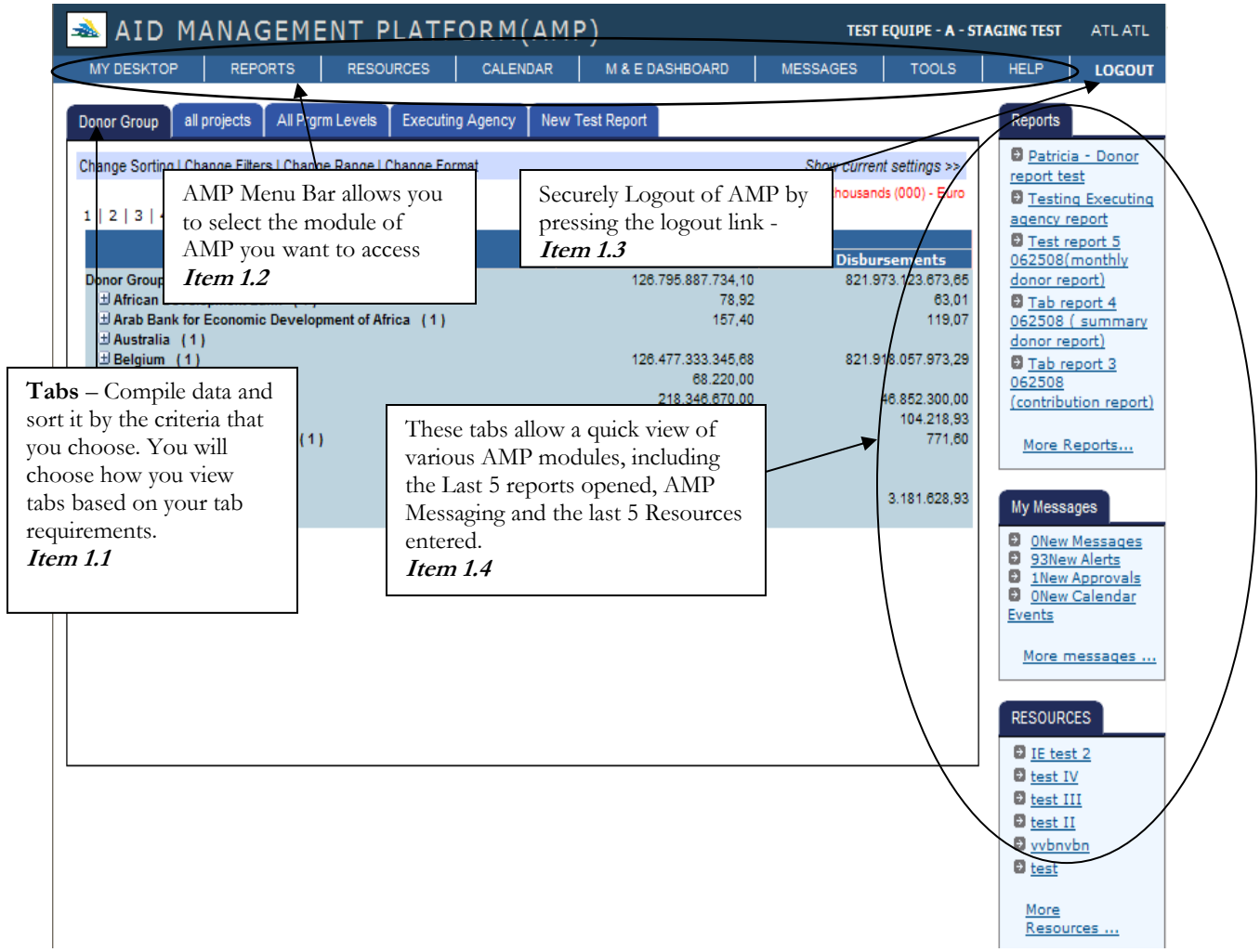
5. Enter your new password again to confirm

6. Click Submit to approve password change

DESKTOP HOMEPAGE

Once you have successfully logged in to the AMP software, you will be directed to the main page of AMP known as the Desktop Homepage. Let's examine the features and content located on the Desktop Homepage.

Information Note: If you belong to more than one workspace/team, after logging in, you will have to select the workspace/team you want to access. Once you select the workspace/team that you wish to access you will be directed to the Desktop Homepage of AMP.



You will notice various tabs and links on the right column of the page (Item 1.4).

- Reports
- My Messages
- Resources

Let's take a look at the purpose of these tabs.

REPORTS

The Reports Tab shows the last 5 reports that you have used. So, this is a means of quickly viewing a recently used report. To continue to the list of all reports, you can click the More Reports link. More information on reports can be found in the Reports section of this manual.

MY MESSAGES

The My Messages tab allows you to quickly see the messages you have waiting for you in AMP. This includes alerts, activity approvals and calendar events. Clicking on the link takes you to the appropriate section. More information can be found in the Messaging portion of this manual.

RESOURCES

The Resources tab allows you to quickly see the last 5 resources you saved in the system. To view more you can click the More Resources link. More information on this tool can be found in the Resources section of this manual.

The Desktop Homepage is just the starting point for AMP. Let's now consider each module in AMP as they are outlined in the menu bar on the Desktop Homepage (Item 1.2)

MY DESKTOP

Overview

My Desktop allows you to create, view and manage projects/activities. In addition, it allows you to control your desktop tabs and change workspaces. There are five components of the My Desktop module that are available in this section of the main menu. These components are:

1. My Desktop
2. Add Activity
3. Add a Tab (Item 1.1)
4. Tab Manager
5. Change Workspaces

My Desktop

Clicking the My Desktop link, will take you the Desktop Homepage. On the Desktop Homepage you will see the various tab(s) you have created or that have been created for you by your Workspace Manager. A key to navigating the Desktop Homepage is understanding what Tabs are and how they work.

TABS

Tabs are ways that projects can be viewed. Tabs compile data and sort the data according to a pre-defined user criterion. Tabs are customizable and allow you to filter how you want data displayed. When you log in to AMP for the first time, no Tabs will be displayed (unless the Workspace Manager has created a Tab and made it available for you to view). You will have to create your own Tabs that define how you want the data to be presented to you.

Tabs have limitations and therefore are not reports. They should be considered as a quick way to find a project or a quick way to view very basic information about a project. When adding desktop tabs, there is also a limit on the amount of columns and how many tabs can be displayed.

When creating a tab, you can only include five (5) columns. You may have three (3) qualitative columns and (2) quantitative columns (or measures). If you try to add more columns when creating a tab you will receive an error message or the step will gray out the options to advance to the next step of creating a tab until you have modified your selections to fit the rules for adding a tab.

In addition, only five (5) tabs can be selected to be shown on your desktop. This tab, in addition to the default tab which is created by the Workspace Manager are the tabs that will show when you log in to AMP. For more information about how to use other tabs created, see the Manage Tabs section.

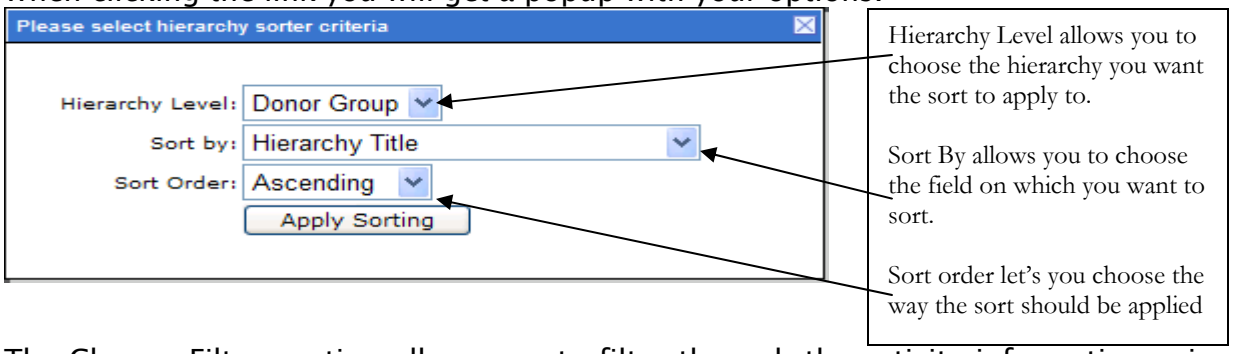
Information Note: To facilitate consistent information sharing, a Workspace Manager can create one tab and make it available to each Workspace Member in the workspace. However, ***each*** Workspace Member can personalize their respective workspace. Workspace Members can create their own Tabs – up to 5. In addition, Workspace Members can delete Tabs they create. However, Tabs added to the workspace by the Workspace Manager cannot be deleted by a Workspace Member unless the Workspace Member has been given the right to do so by the Workspace Manager.

When you view your tabs you will notice there are various filtering and sorting options available.

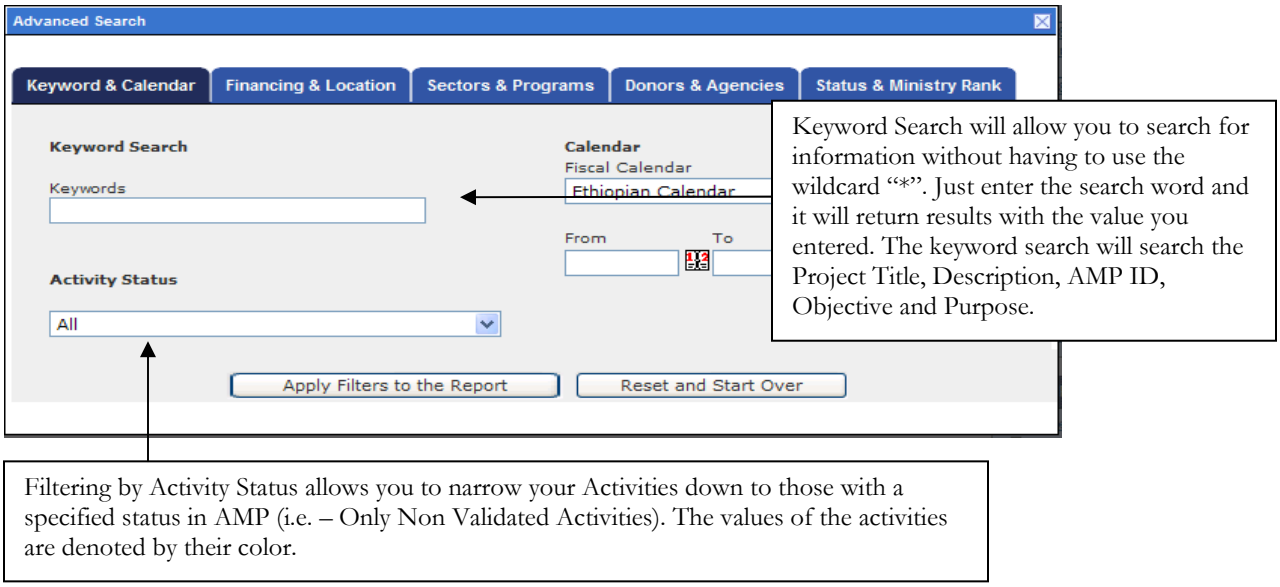
Filter, Sorting, Formatting and Changing Range of Tabs

There are options to Change Sorting, Change Filters, Change Range and Change Hierarchies listed with each Activity Tab when it is activated.

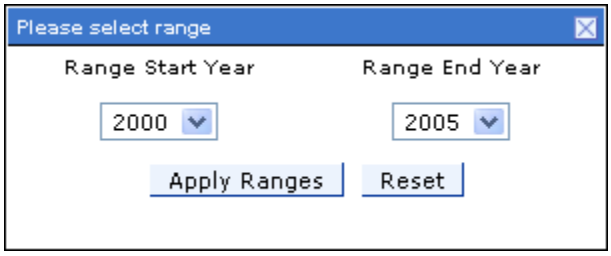
The Sorting Option, allows you to control how the information is organized on the page. When clicking the link you will get a popup with your options.


Please select hierarchy sorter criteria
Hierarchy Level:
Donor Group
Sort by:
Hierarchy Title
Sort Order:
Ascending
Apply Sorting
Hierarchy Level allows you to choose the hierarchy you want the sort to apply to.
Sort By allows you to choose the field on which you want to sort.
Sort order let's you choose the way the sort should be applied

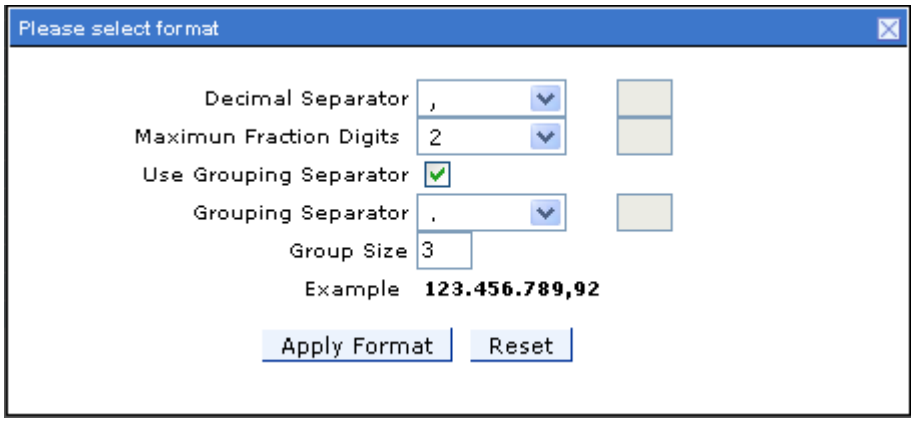
The Change Filters option allows you to filter through the activity information using various criteria. Each search criteria is denoted by a tab. Once the selected information is chosen, you can then click Apply Filter to activate the filter within the active desktop tab.


Advanced Search
Keyword & Calendar
Financing & Location
Sectors & Programs
Donors & Agencies
Status & Ministry Rank
Keyword Search
Keywords
Calendar
Fiscal Calendar
Ethiopian Calendar
From
To
Activity Status
All
Apply Filters to the Report
Reset and Start Over
Keyword Search will allow you to search for information without having to use the wildcard "*". Just enter the search word and it will return results with the value you entered. The keyword search will search the Project Title, Description, AMP ID, Objective and Purpose.
Filtering by Activity Status allows you to narrow your Activities down to those with a specified status in AMP (i.e. – Only Non Validated Activities). The values of the activities are denoted by their color.

The Change Range option allows you to select the year range for the information that will appear on your desktop tabs.



The Change Format option lets you modify the various ways the information appears on your desktop.



Adding Tabs to Your Desktop Homepage

To add a Tab to your Desktop Homepage, click on the Add Tab link located under the My Desktop menu option (Item 1.2). Once you click this link you will be directed to AMP's desktop tab generator.

Information Note: Tabs are necessary to view any Activities you add to AMP. Therefore, be sure to create at least one Tab for Activity viewing. More Tabs can be added, edited or deleted as you specify the exact criteria for Activity viewing.

Tab Management

Due to the limitation that only allows a total of six tabs to appear on the Desktop Homepage (see "TABS" for more info), there are two ways designed to allow a user to manage the creation of more tabs and the order of the tabs on the desktop homepage.

If you create more tabs than those allowed for viewing on your desktop, an additional tab named "More Tabs" appears on your desktop. Clicking this tab will show you a dropdown that allows you to view the additionally created tabs. To do this, an additional tab is created and constantly refreshed with whatever tab you choose from the dropdown.

INSERT SCREEN SHOT

If you decide that you would like to modify the tabs available for viewing on the desktop and/or to see what tabs you have created along with their criteria, you can click the Tab Manager option located on the My Desktop dropdown.

INSERT SCREEN SHOT

When you click on the Tab Manager you are shown a table that lists all tabs available for your use along with the Type of tab, hierarchies selected and the columns and measures that are in the tab. From this manager you can either edit the layout of the tab or delete it.

In addition, you can reorder the tabs available on the desktop and choose different tabs to be available on your desktop. Click the Manage Active Tabs link and you get a popup that allows you to do this.

INSERT SCREEN SHOT

Activities in different stages of approval appear in different colors in the tabs.
Blue text: Validated activities
* Green Text: New Unvalidated. These are activities that have never been validated by a workspace manager.
Green Text: Existing Unvalidated. These are actvities that have been approved at least once by a workspace manager. These are activities that have since been edited after validation.

* Red Text: New Draft. These are activities that have been saved as a draft and have never been validated by a workspace manager.
Red Text: Existing Drafts. These are activities that have been saved at least once before and never validated but have since been saved as a draft.

Change Workspace

A useful feature of AMP is the ability to change your workspace without having to log off and log back in. This feature only works if you are assigned to multiple workspaces.

To use this feature, simply click on the Change Workspace link in the dropdown menu. It will show all workspaces that you are affiliated with. Click the workspace and AMP will transfer you to the selected workspace.

ACTIVITIES

Activities are projects that you create for tracking and management by AMP. Once you create Activities, you then have information that can be parsed as needed for reports and for Tabs that will appear on the Desktop Homepage.

Definition: The term Activities and Projects can be used interchangeably when referring to this aspect of AMP. An Activity is a Project.

Information Note: When creating Activities you have the option to Save the Activity or save it as a Draft. Saving an activity as a draft allows you to enter some information and return to the project at another time to enter the rest of the information.

- When **saving as a draft** the only required field is **Project Title**.
- When **saving an activity**, the required fields are **Project Title, Status and Sector**. If these fields are not properly filled in, you will receive an error when trying to Save the Activity.

1. Add Activity

Step 1

- Click Add Activity in the My Desktop menu dropdown

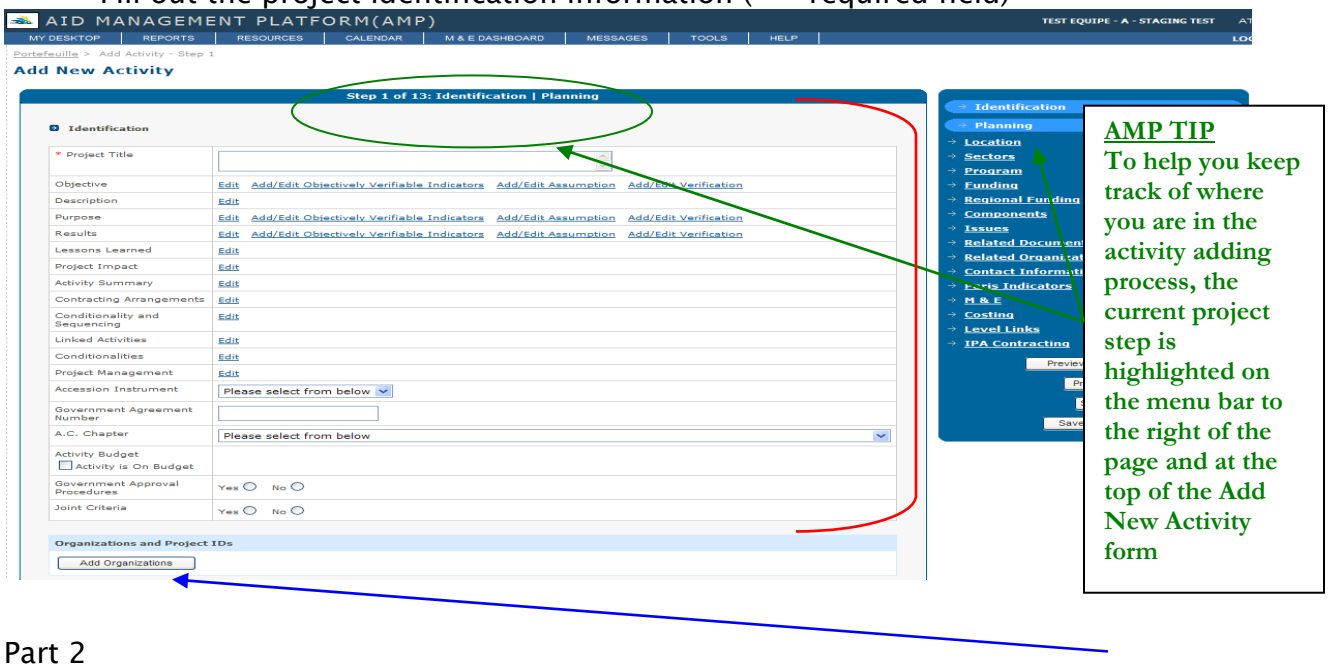
Step 2

Step 1 of 10: Identification | Planning

This step allows you to plan for the development of the project.

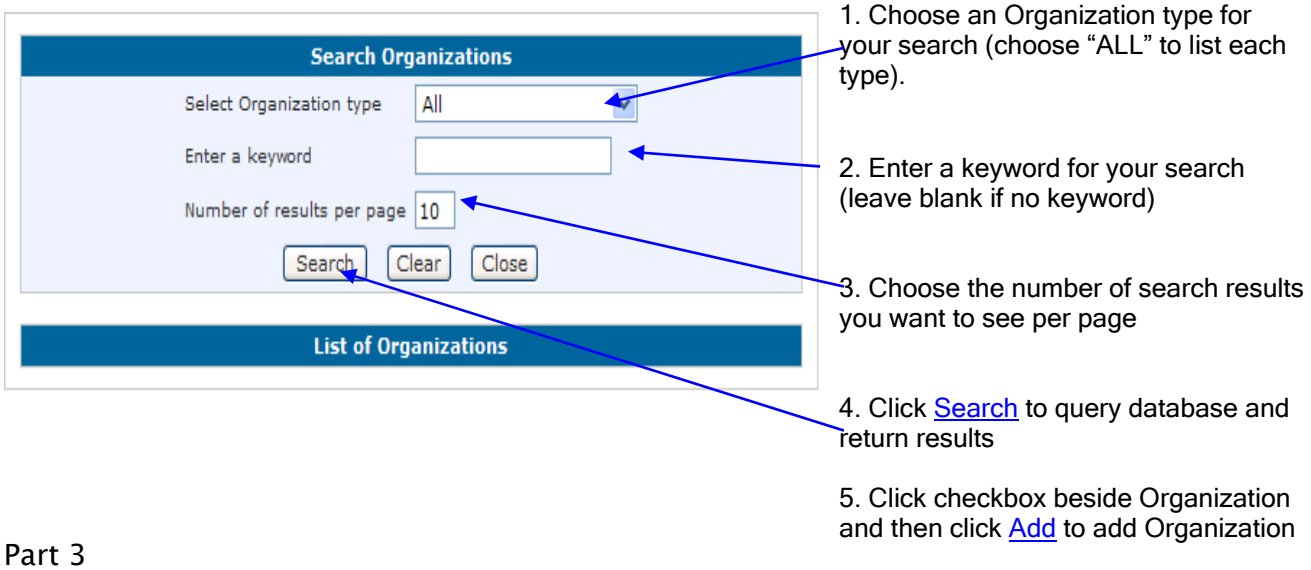
Part 1

- Fill out the project identification information (* = required field)



Part 2

- To add Organizations that are a part of the project – click the Add Organizations button.

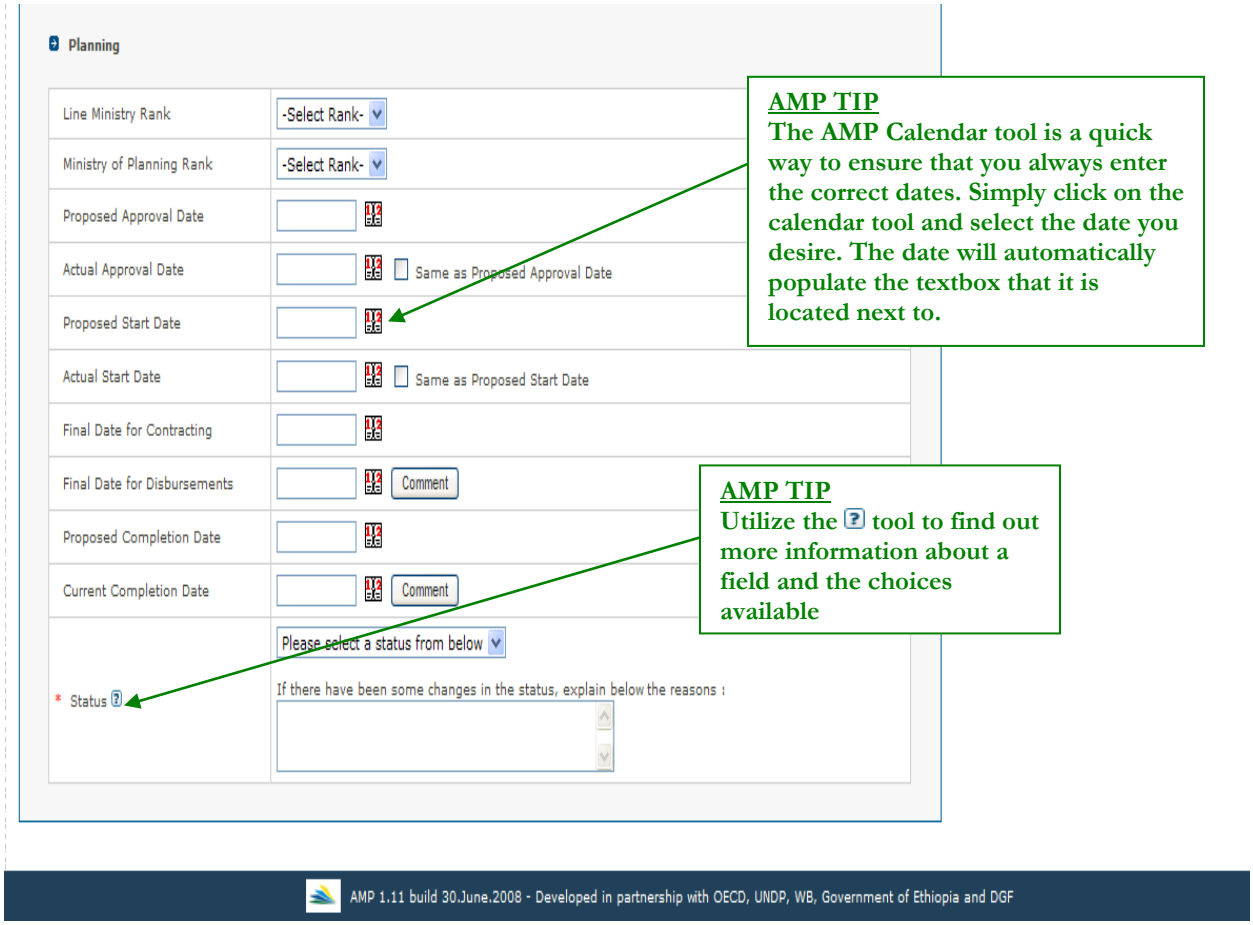

Search Organizations
Select Organization type
All
Enter a keyword
Number of results per page
10
Search
Clear
Close
List of Organizations
1. Choose an Organization type for your search (choose "ALL" to list each type).
2. Enter a keyword for your search (leave blank if no keyword)
3. Choose the number of search results you want to see per page
4. Click Search to query database and return results
5. Click checkbox beside Organization and then click Add to add Organization

Part 3

- Once the Organization is added, enter the Project's ID given by that organization in the corresponding textbox that appears beside the Organization's name.

Part 4

- Fill in the Planning information for the project. (* = required field)


Planning
Line Ministry Rank
-Select Rank-
Ministry of Planning Rank
-Select Rank-
Proposed Approval Date
Actual Approval Date
Same as Proposed Approval Date
Proposed Start Date
Actual Start Date
Same as Proposed Start Date
Final Date for Contracting
Final Date for Disbursements
Comment
Proposed Completion Date
Current Completion Date
Comment
Please select a status from below
* Status
If there have been some changes in the status, explain below the reasons :
AMP TIP
The AMP Calendar tool is a quick way to ensure that you always enter the correct dates. Simply click on the calendar tool and select the date you desire. The date will automatically populate the textbox that it is located next to.
AMP TIP
Utilize the tool to find out more information about a field and the choices available
AMP 1.11 build 30.June.2008 - Developed in partnership with OECD, UNDP, WB, Government of Ethiopia and DGF

Part 5

- Click on References to proceed to Step 2 of 10: References

Step 2 of 10: References

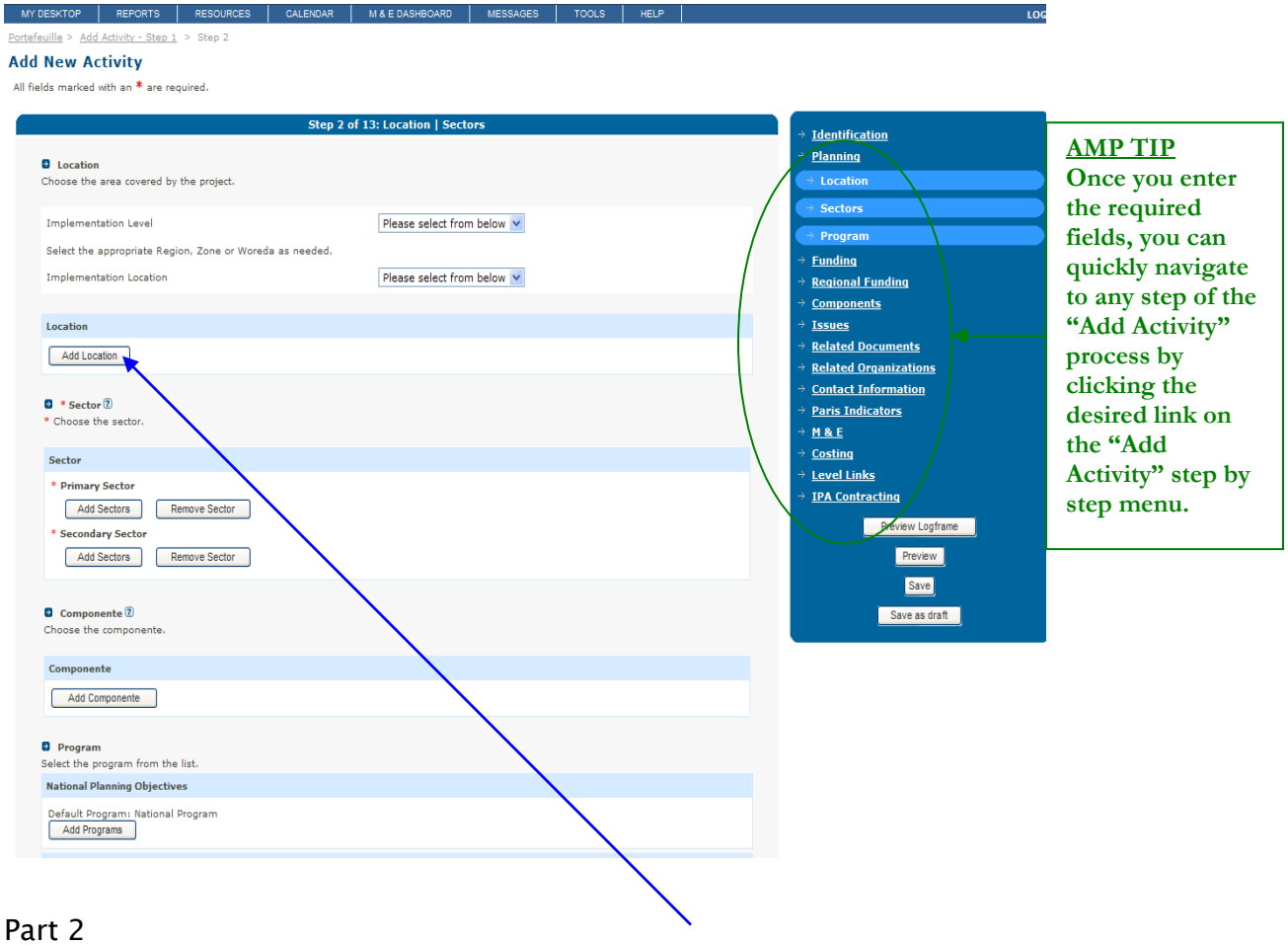
References allow you to indicate which country strategies and documents are related to this project. After entering the necessary information, click on Location to proceed to Step 3 of 10: Locations/Sectors/Programs.

Step 3 of 10: Locations/Sectors/Programs

Step 3 of 10 allows you add information on locations, sectors and programs related to the project. This includes percentage breakdowns.

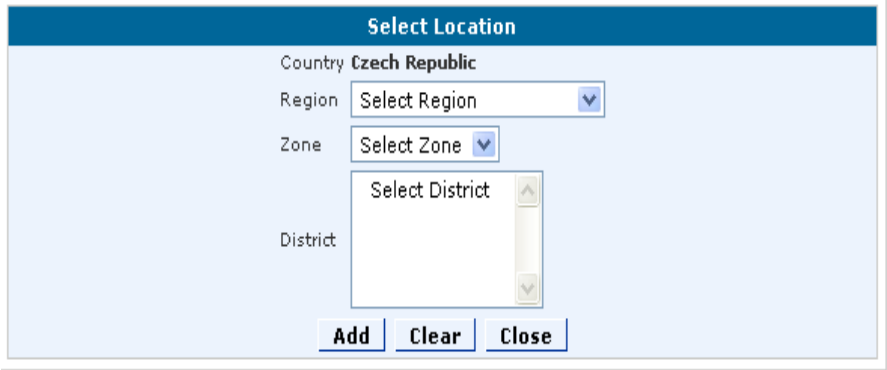
Part 1

- Fill in the implementation information that is associated with the location. The implementation level indicates whether the project will be implemented at a national or regional level, or both.



Part 2

- Add location(s) (as needed) – Click Add Location

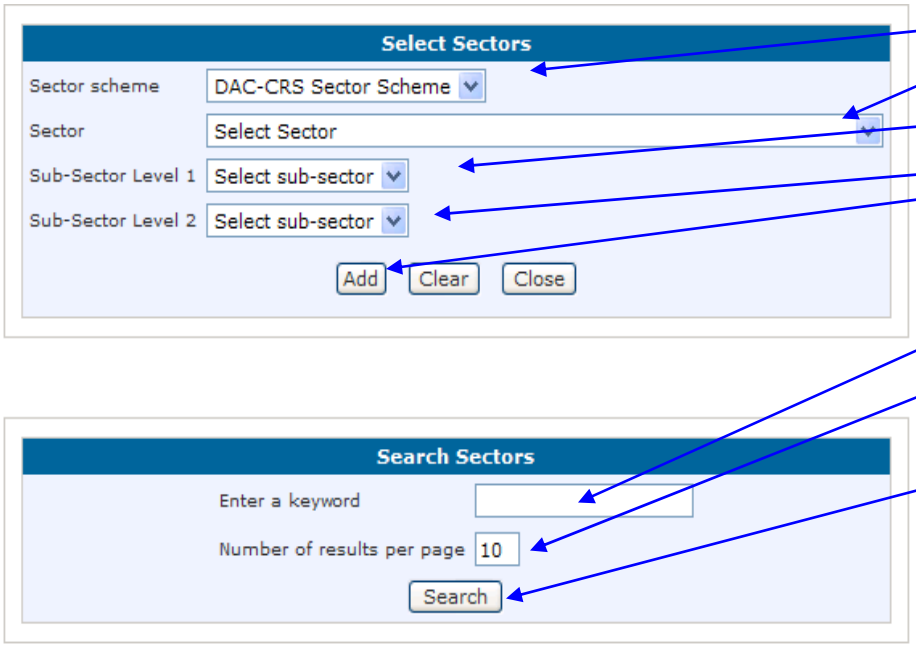


1. Select your location. The level of locations displayed depends on the "Implementation Location" field. If the implementation level is set to "Country" there will not be any location to select as the country is already set.
2. Click Add to add location

Part 3

- Click Add Sectors (* = required field)

Information Note: A project can have sectors from more than one sector scheme. Furthermore, a project can have more than one sector from each scheme. If you can choose both a Primary and Secondary Sector Scheme, you must choose at least one sector from each. Each sector has a percentage indicating its "weight" in the project. **The sum of all sectors within each scheme must equal 100%.** If they do not equal 100% you will receive an error message from AMP.



1. Select Sector
2. Select Sub-Sector Level 1
3. Select Sub-Sector Level 2
4. Click Add

OR

1. Enter a Keyword
2. Select Number or results per page
3. Click Search
4. Place check next to desired sectors
5. Click Add

- To remove a sector you have added, click the checkbox next to the sector name, then click the "Remove Sector" button. You can also remove a Secondary Sector Scheme using the same procedure.

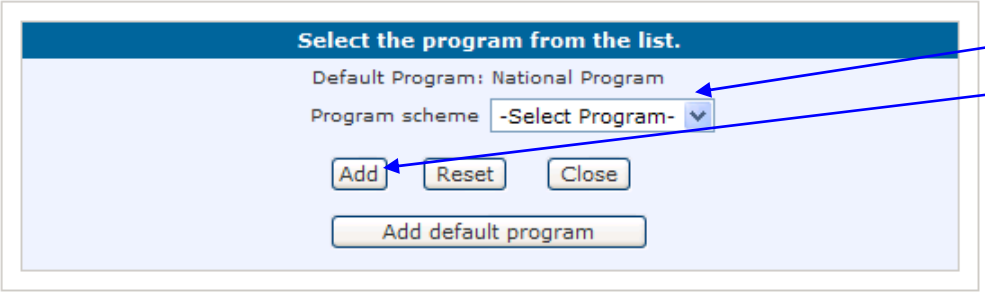
Part 4

- Adding a program to an activity links the specific activity to a program from the National Planning Dashboard (NPD). Programs can be national, sector based, regional, or other kinds of development strategies. The National Planning Objective(s) selected

indicate that the activity is expected to help reach the goals of that program or strategy.

- AMP supports three program levels: National Planning Objective, Primary Program, and Secondary Programs. Each level has a default program, and users can only select programs from within these default programs. Default programs are set by the administrator.

- Click Add Program



1. Select program
2. Click Add
3. Click Add default program to add the default program at the top level

Part 5

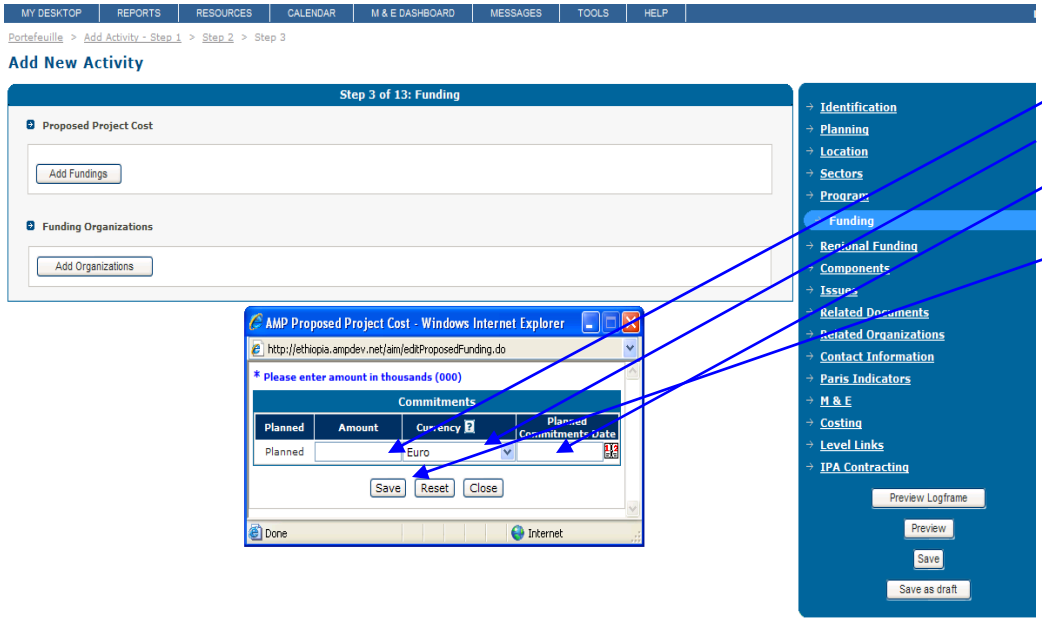
- Click on Funding to proceed to Step 4 of 10: Funding

Step 4 of 10: Funding

This step allows you to enter the funding information based on the funding agency.

Part 1: Proposed Project Cost

- Click Add Funding to enter an estimation of the project overall cost (during the planning phase)



1. Enter Amount
2. Choose currency
3. Enter planned commitment date
4. Click Save

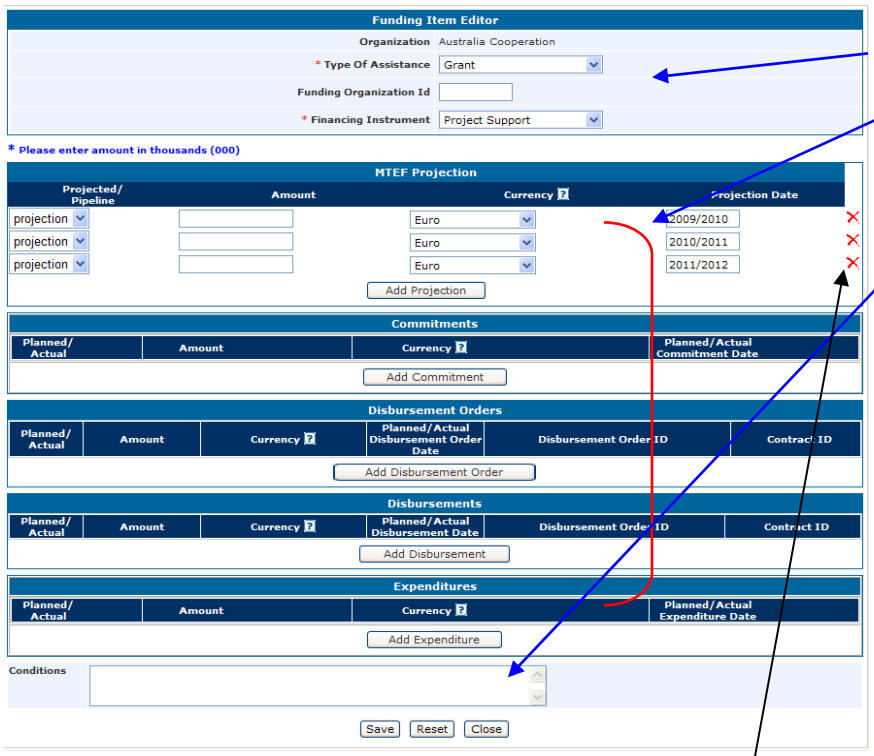
Part 2: Funding Organizations

- Click Add Organization to select a Funding Organization
  - *To add an Organization, see Step 1 of 10: Identification / Planning – Part 2*
- To delete an organization, select the Organization from the list of funding organizations and click the "Remove Organization" button.

Part 3: For each organization added, enter funding information

- Click Add Funding (click the button that corresponds with the Organization to which you wish to add funding information)

Information Note: An activity cannot be saved if a funding organization is entered without corresponding funding information. At a minimum – Commitments are required.



1. Enter the Organization information
2. Add MTEF / Commitments / Disbursements / Disbursement Orders / Expenditures as needed by clicking Add
3. Type in any Conditions
4. Click Save

For commitments, the user may also have to enter an exchange rate and the currency in which the amount is converted to.

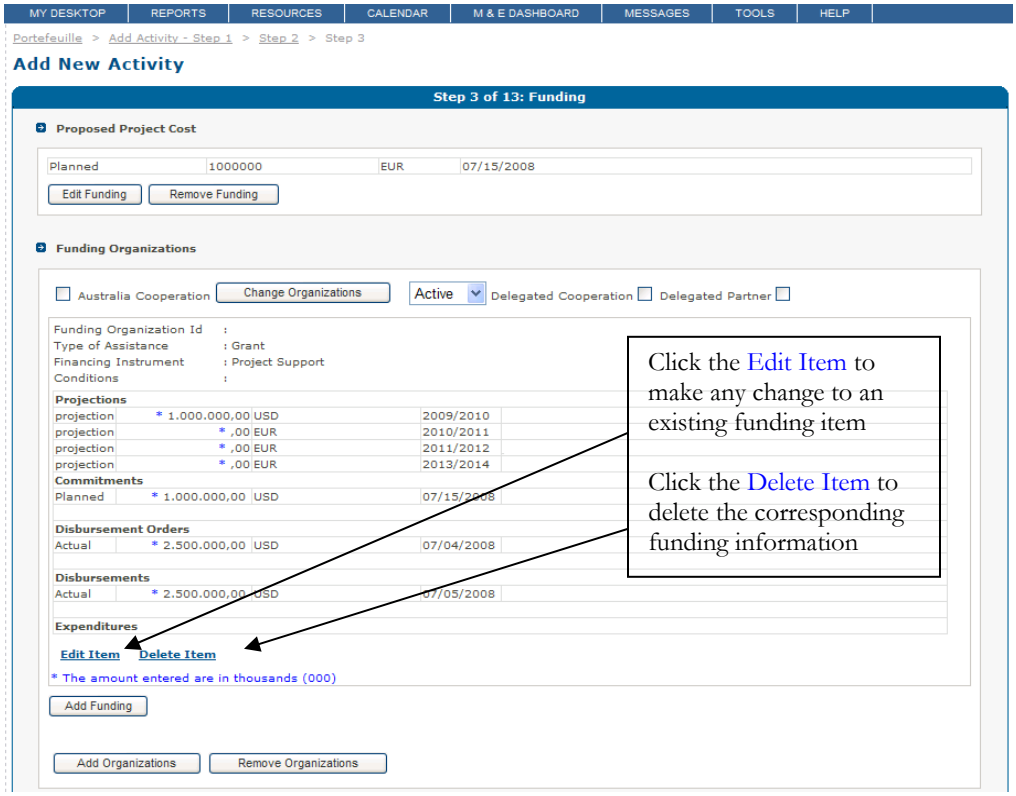
Disbursements can be linked to disbursement orders on this form. Just select the appropriate disbursement order ID from the drop-down.

Disbursements can also be linked to contracts; follow the same procedure for disbursement orders.

Information Note: To delete a commitment/disbursement order/disbursement/expenditure item, click the ✕ icon at the end of the item line.

Part 4

- View saved funding information



Part 5

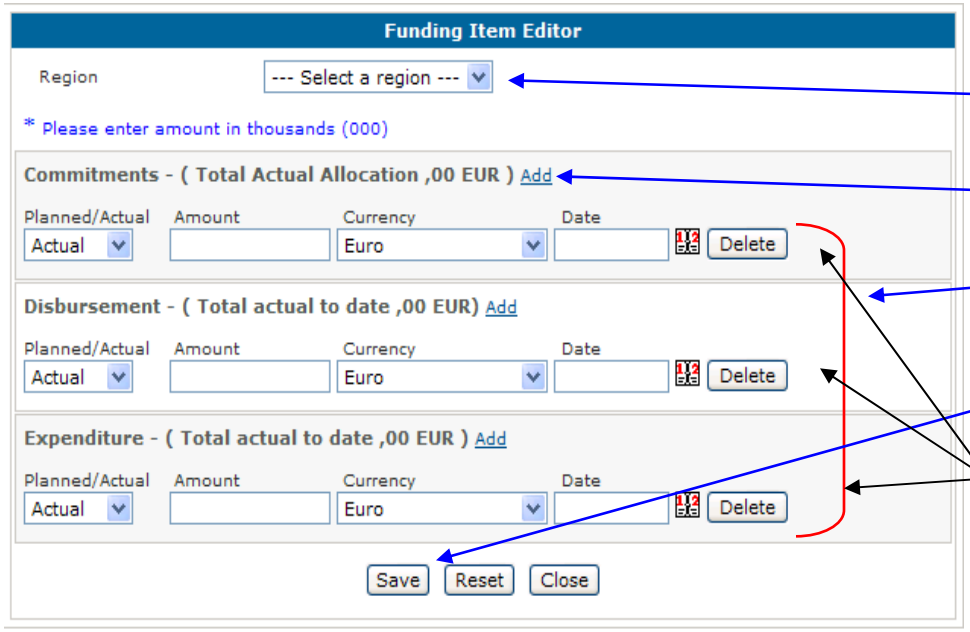
- Click on Regional Funding to proceed to Step 5 of 10: Regional Funding

Step 5 of 10: Regional Funding

This section allows you to breakdown the funding information by region. This information can be entered only when one or more regions have been selected in Step 3 of 10: Location.

Part 1

- Click Add Funding

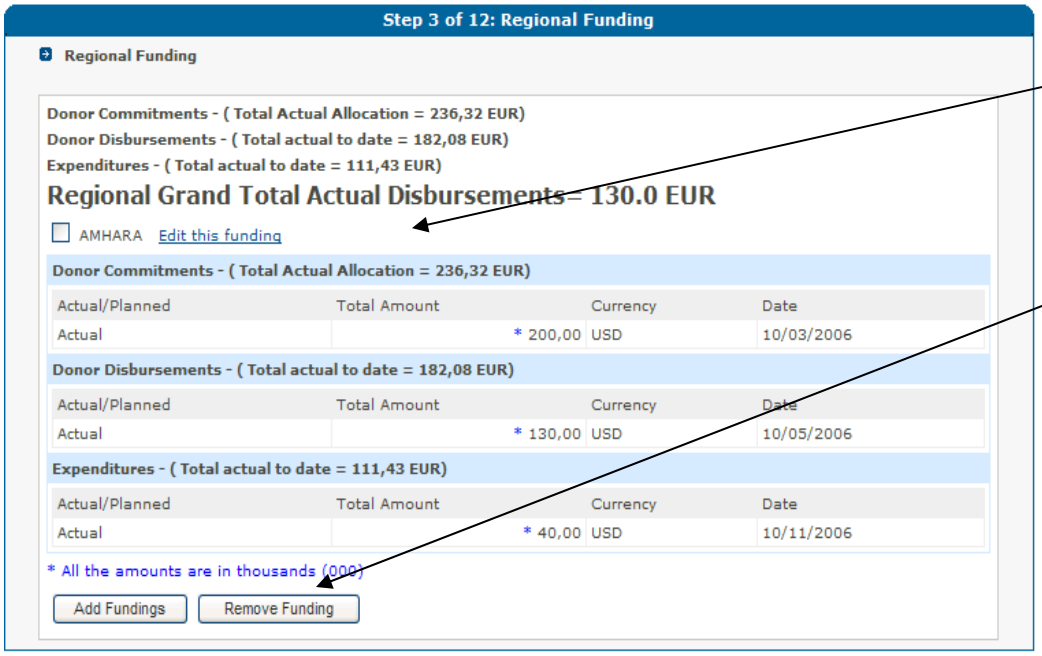


1. Select the region to which funding has been allocated
2. Click Add – next to corresponding funding option
3. Fill in the corresponding funding information (i.e. Planned/Actual, Amount, Currency, etc;)
4. Click Save

To delete an entry, click Delete located next to the corresponding entry

Part 2

- View saved information



Click Edit this funding to change corresponding funding information

To delete a funding:

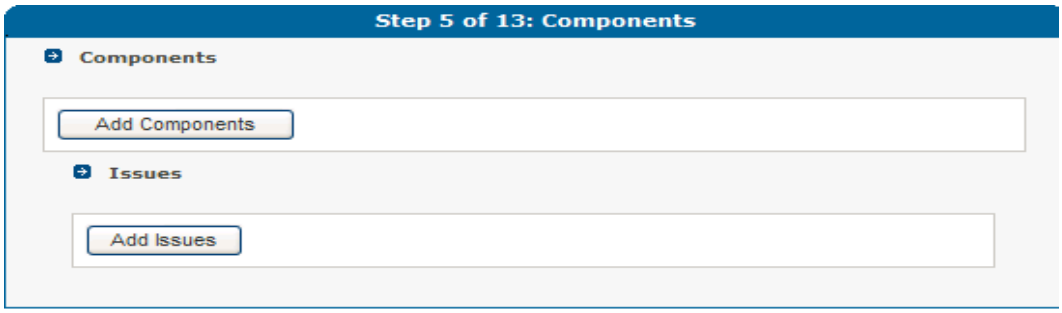
1. Click checkbox corresponding to funding information
2. Click Remove Fundings

Part 3

- Click Components to proceed to Step 6 of 10: Components/Issues

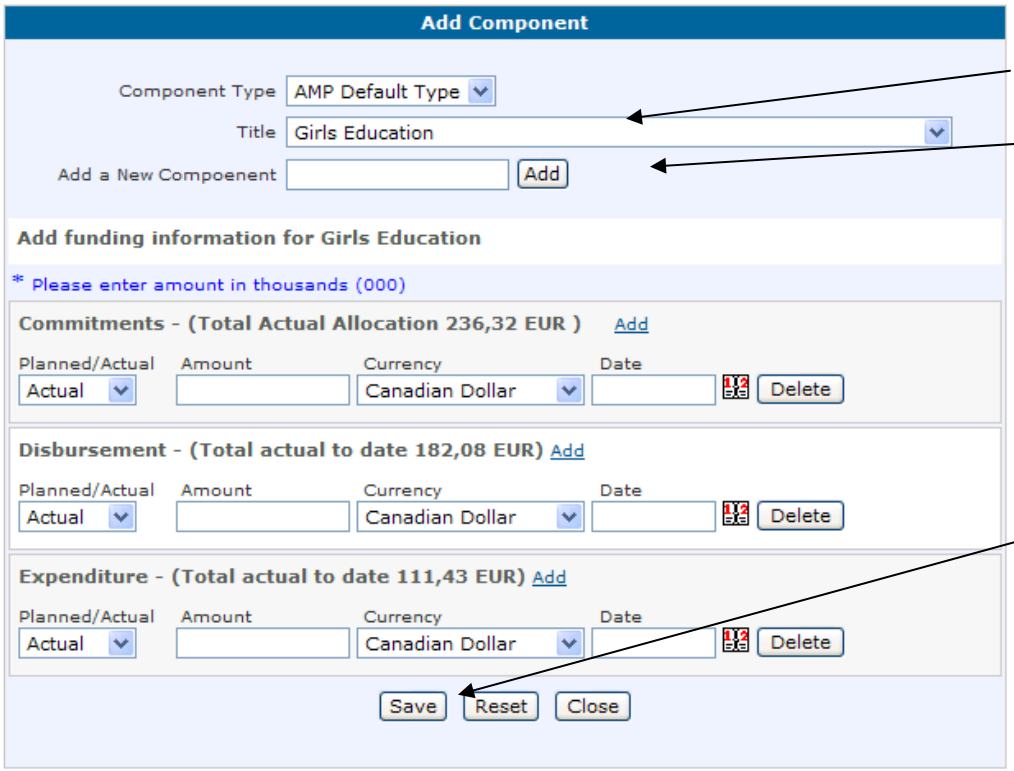
Step 6 of 10: Components/Issues

This step is designed to allow you to enter the components of the activity and any funding associated with any of them. It can also represent another classification of the funding information entered in Step 3. You can also enter any issues related to the activity along with any measures taken to resolve the issue.



Part 1

- Click Add Components



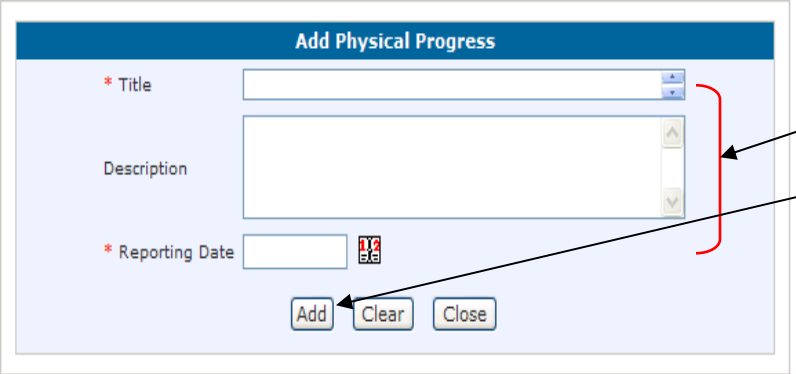
1. Select Component Type (* = required field)
2. Sekect a copmponent from the list, or create a new component and click Add
3. Click Add next to corresponding funding item
4. Select "Planned" or "Actual" from dropdown list
5. Enter amount in thousands
6. Select a currency and select a date by clicking on the calendar icon
7. Click Save

- To delete a component, click Delete next to the "Perspective" dropdown menu of the item.
- To edit a component's information, click the Edit link next to the component's name and make any desired changes in the pop-up window that appears. Click the Save button to save the changes.
- To remove a component, check the box in front of the component's name and click Remove Component

Part 2

- Click Add Physical Progress (* = required fields)

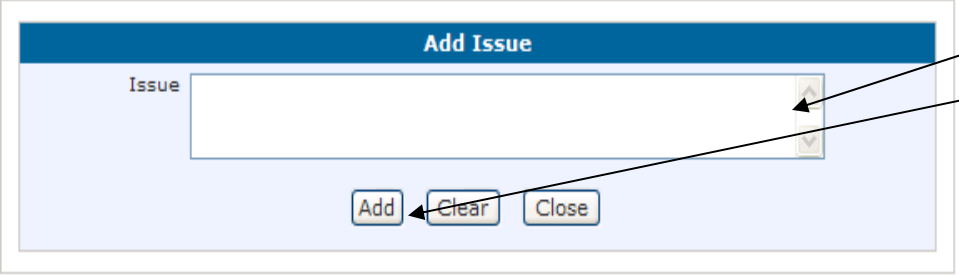
Definition: Physical progresses are measurable tasks that provide details qualitative information. Physical progress can be added only to existing components.



- To edit the physical progress information click on the physical progress title. Enter any desired changes in the pop-up window and click the "Add" button to save the changes.
- To remove a physical progress item, click the ✗ icon on the right hand side of the component box

Part 3

- Click Add Issues

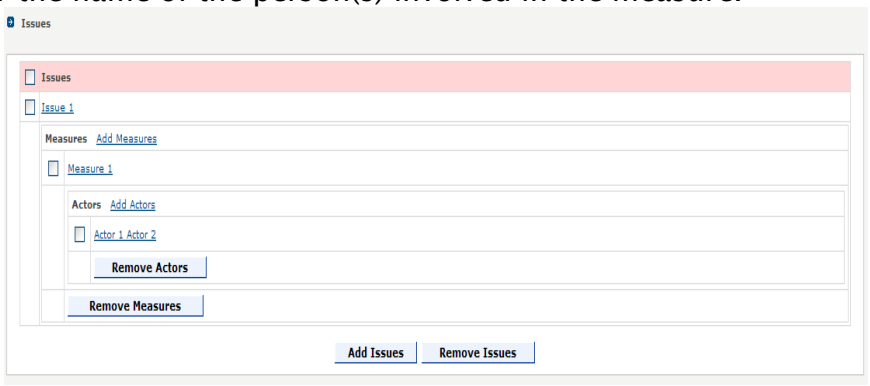


- To remove an issue, click the checkbox corresponding to the issue and click Remove Issue

Part 4

- To add a measure relating to the issue, click Add Measure. In the pop-up window that appears, describe the measure. To add an actor, click Add Actor. In the pop-up window that appears, enter the name of the person(s) involved in the measure.

To delete an actor or measure:
1. Click checkbox corresponding to the actor or measure.
2. Click Remove Actors or Remove Measures



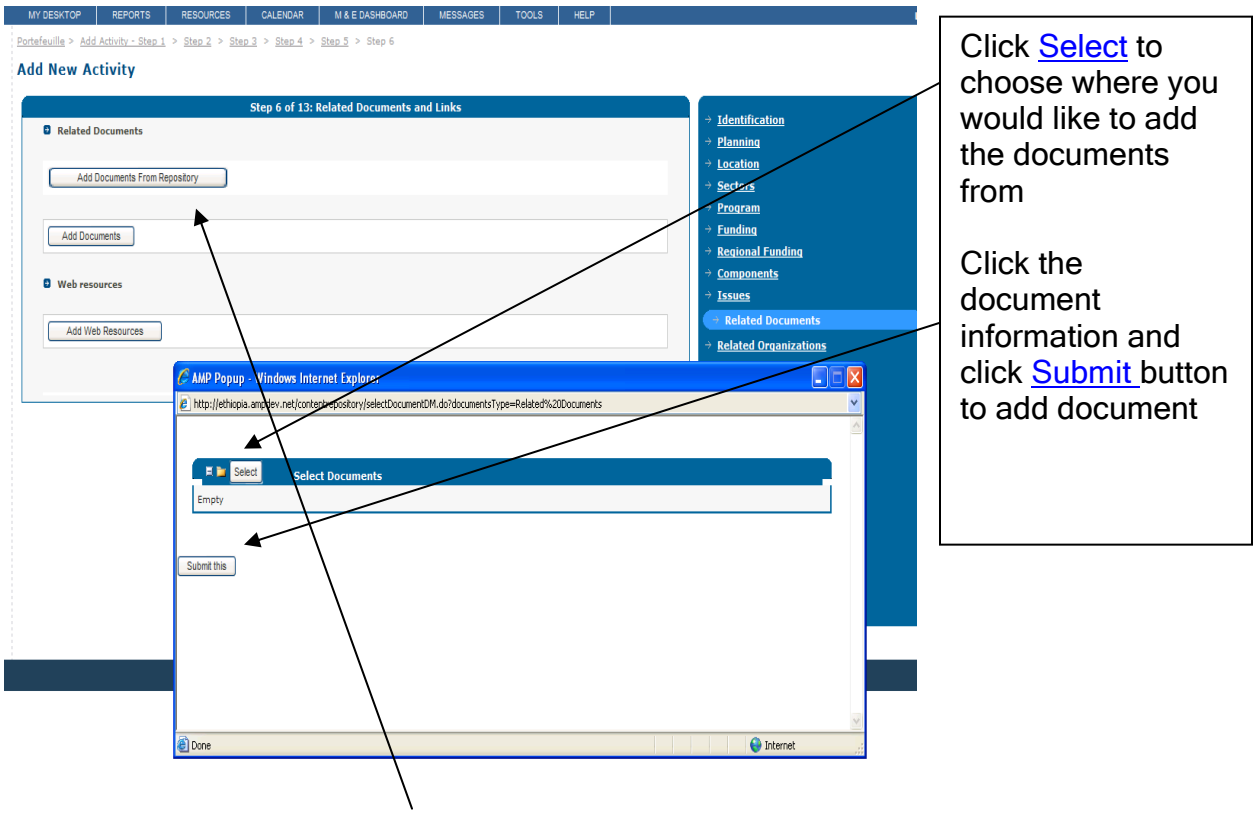
- To make changes to an issue/measure/actor, click the name of the issue/measure/actor and make any desired changes in the pop-up window that appears.

Part 5

- Click Related Documents to proceed to Step 7 of 10: Related Documents.

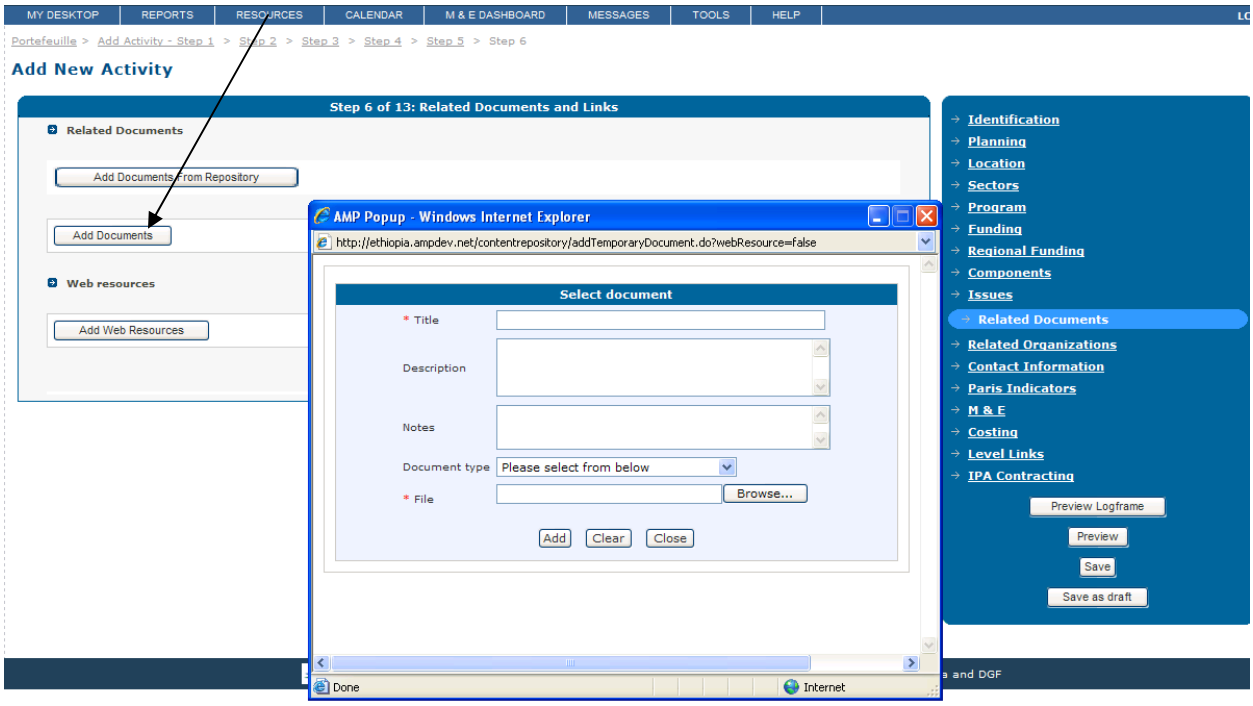
Step 7 of 10: Related Documents

This step allows you to upload any related document(s) or enter hyperlinks to any related web resource



Part 1

- Click Add Documents from Repository
- Click Add Documents



Part 2

- Enter title, description, comments, date, document type and language in pop-up window that appears.

Part 3

- Click Browse

Part 4

- Select document to add from your computer

Part 5

- Click Add (uploads document to the server)

Part 6

- Click checkbox if you wish to have the file shown on your personal homepage (*Related Links box on the Desktop Homepage*)
- *To delete a document, select the check box next to the document name and click the "Remove Document" button.*

Part 7

- Click Add Web Resources (to add a related hyperlink to a website)

Part 8

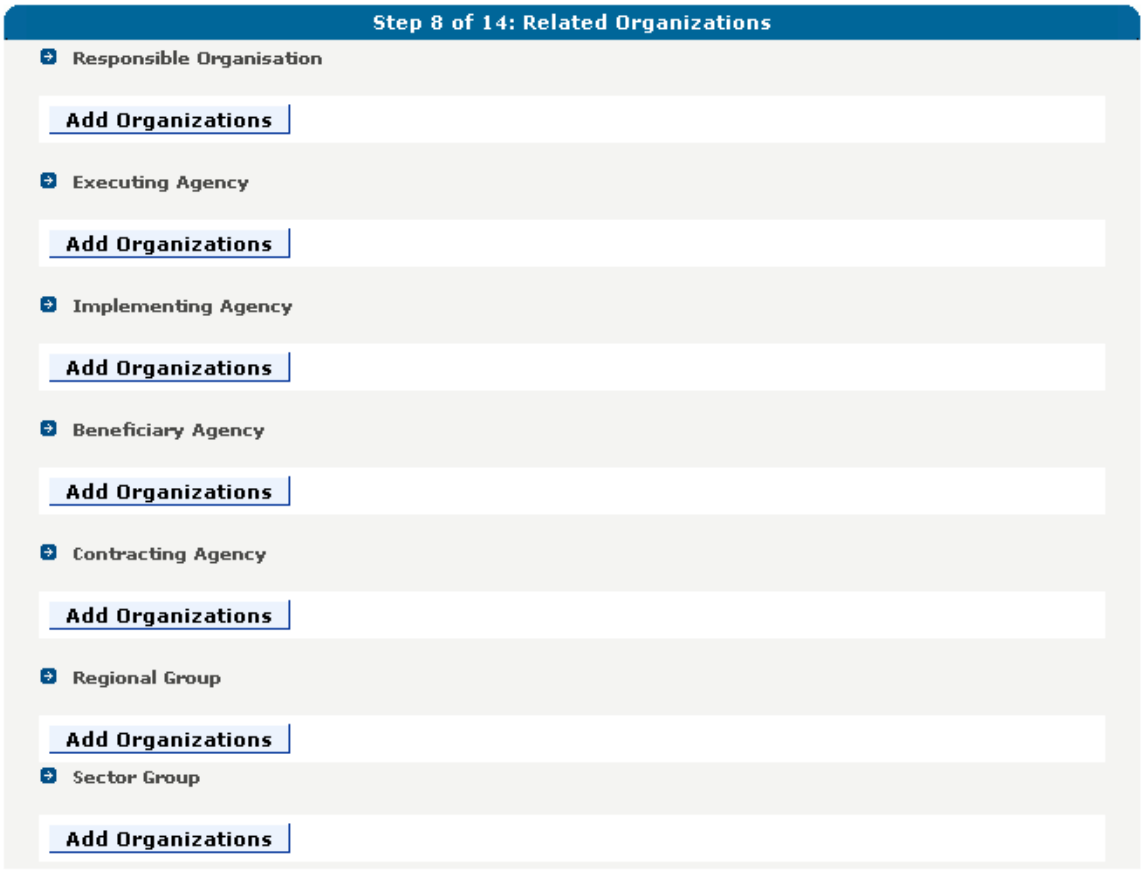
- In the pop-up window that appears, enter a title, description, comments date, document type and language, and URL. Click Add. The user may also choose to have the link shown on his/her personal homepage by checking the box below the web resource URL.
- *To delete a link select the check box next to the name of the resource and click the "Remove Web Resources" button.*

Part 9

- Click Related Organizations to go to Step 8 of 10: Related Organizations

Step 8 of 10: Related Organizations

This step allows you to enter information on the executing, implementing, beneficiary, and contracting agencies related to the project.



To add a responsible organization, executing agency, implementing agency, beneficiary agency, contracting agency, regional group or sector group click the "Add Organizations" button in the corresponding section. In the pop-up window (Screenshot 2.5) that appears, select the type of organization from the drop-down menu and if desired, enter any keywords in the textbox below the menu, then click the search button. Select the desired organization(s) from the list of search results and click the "Add" button. To perform a new search, click the "Clear" button and enter the new criteria. To delete an organization, select the organization and click the "Remove Selected Organizations" button.

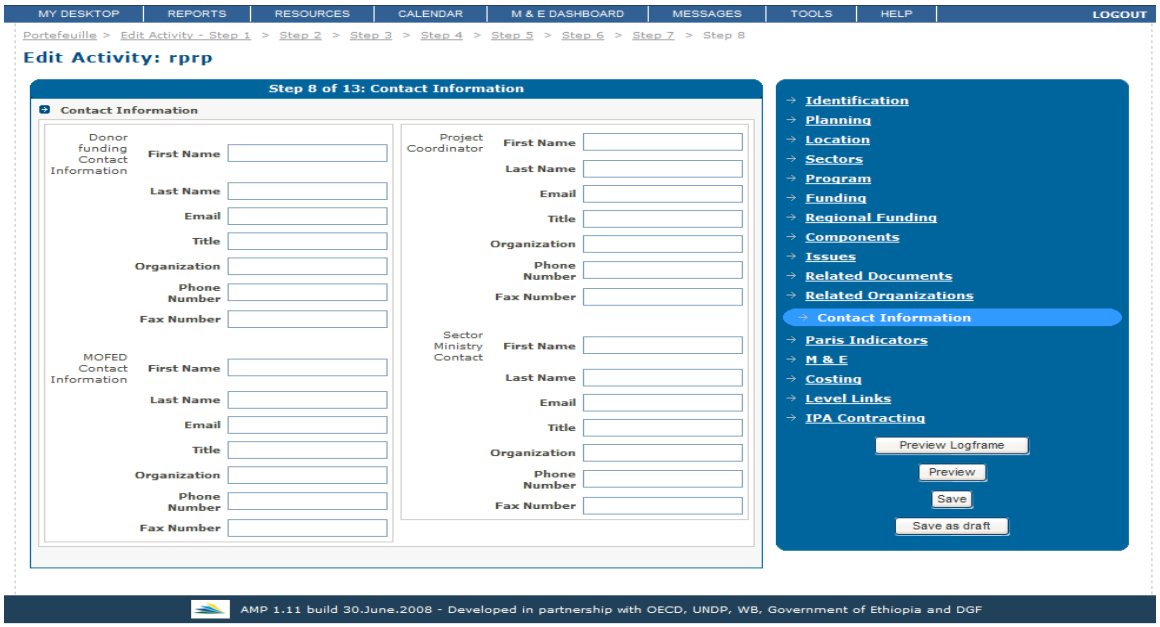
After entering the necessary information, click on Contact Information to proceed to Step 9.

Step 9 of 10: Contact Information

This step allows you to enter contact information of donor and government contacts.

Part 1

- Fill in contact information for Donor, Government, Project Coordinator, and Sector Ministry Contact

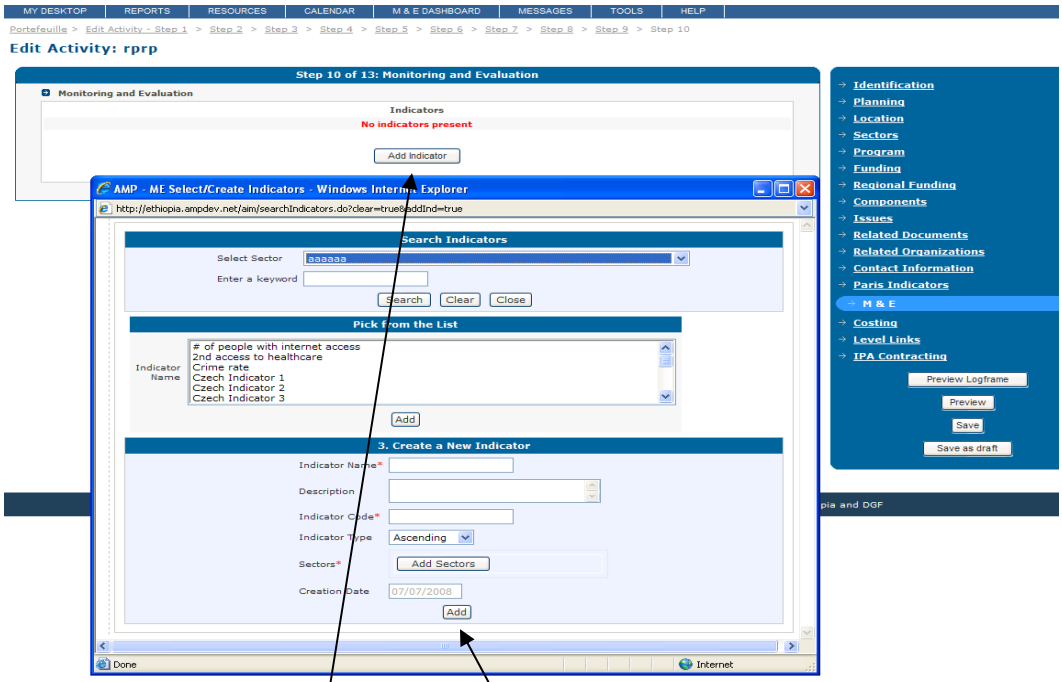


Part 2

- Click M & E to proceed to Step 10 of 10: Monitoring & Evaluation.

Step 10 of 10: Monitoring & Evaluation

This step allows you to monitor and evaluate the activity by entering information regarding each indicator associated to an activity: base, target, and current values.



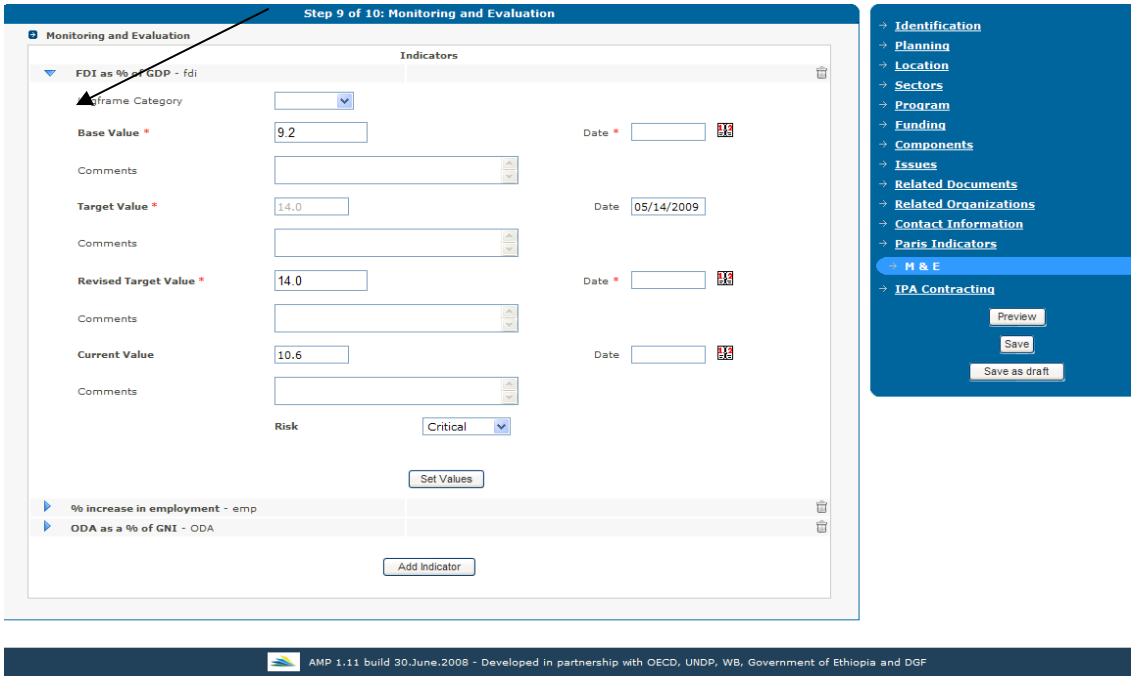
Part 1

- Click Add Indicator button when there is no indicator already present for the activity.

- Select the indicator(s) you would like to add to this activity and press the Add button, or
- Create a new indicator by clicking the Add New Indicator, entering the relevant information, and clicking the Add button.

Part 2

- Click the ▶ icon in front of an indicator's name to enter a value for that indicator



Part 3

- Select a value from the Logframe Category drop down
- Enter the base, target, and current values for the indicator in the corresponding textboxes.
- Enter the base, target, and current values dates by clicking on the calendar icons and choosing the correct date.
- Enter any comment for a value in the corresponding "Comments" textbox. Select a risk level from the "Risk" drop-down menu.

Part 4

- Click Set Values to save this data. Note: you will still need to save the activity to save all of the data for the activity.
- A new field will appear: Revised Target Value with textboxes for the value, date and comments. The default value of the Revised Target Value is the Current Value. The default date is the Target Value date. You can make any desired changes.
- To remove an indicator from an activity, click the 🗑 icon that corresponds to the indicator you'd like to remove.

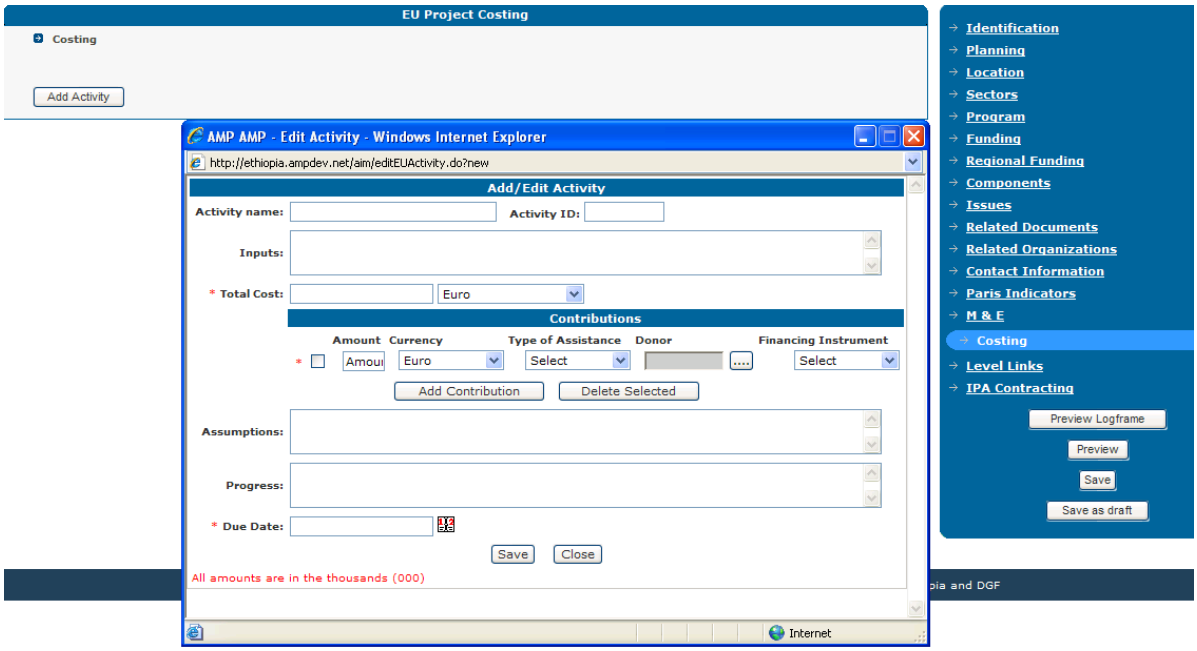
Part 5

- Click Costing to proceed to the addition step: Costing.

ADDITIONAL STEPS:

Costing

The Costing feature will allow you to estimate the cost of proposed project components. This tool can be used in the early phases of project planning to capture potential costs as a basis for discussion with donors. As donors express an interest in funding potential components of the project, these "contributions" can then be entered into the costing module. AMP will automatically calculate the discrepancies between the estimated cost of a project and the contributions towards the projects (identifies gaps in funding).

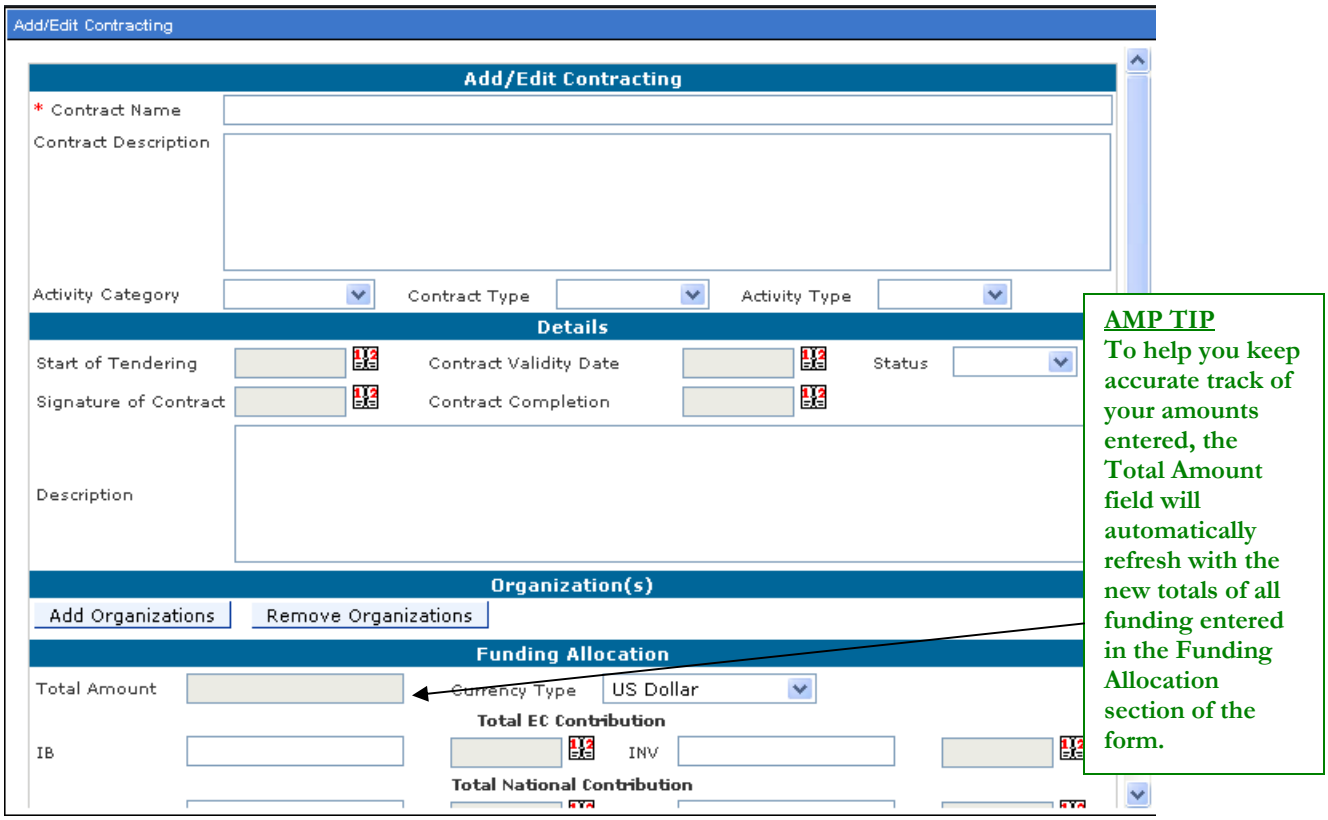


Part 6

- Click Contracting to proceed to the addition step: Contracting.

Contracting

The Contracting module allows you to attach specific contracting information with the activity. This includes the ability to denote disbursements that are related to a specific contract.



You can add disbursements to the contract also as an additional way to track contract related disbursements. (Information Note: You can also link a contract number to a disbursement in the when adding funding information. This allows you to quickly add contracts while adding funding information.)

2. View an Activity

Viewing an activity allows you to view the information that was added in the Activity Form.

Step 1

- Click the field appearing as a link (project ID or name, depending on the fields selected when creating the tabs) in the projects list – allows you to view project details
- The project is displayed in view mode, with its details split among several tabs. These tabs are:
  - Overview
  - Financial Progress
  - Physical Progress
  - Documents
  - Regional Funding

- Paris Indicators
- Dashboard
- Costing

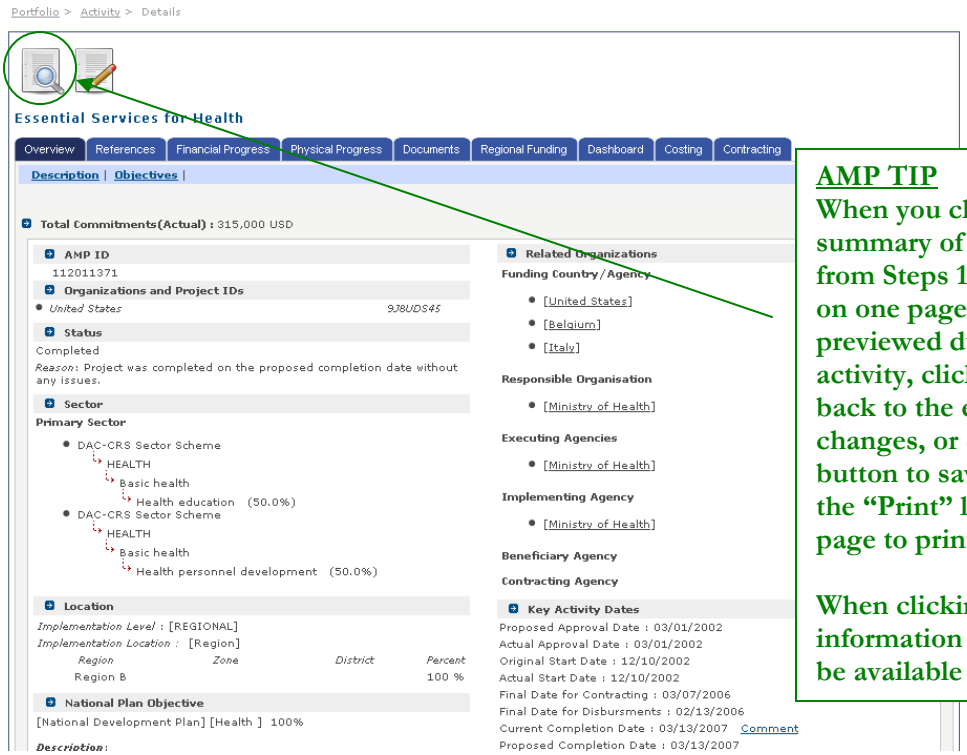
Step 2

There are various views allowed. Choose the view that you need and modify the project if desired. Let's provide an overview of your view and edit options.

Overview

This tab gives a general overview of the activity, including Project IDs, status, sector, location, program, donor and government contact information, related organizations, key activity dates, assistance type, financing instruments, and activity creation details.

Click Preview to get a preview of the information available for the activity, or click Edit to make changes to the information. You also have the option to preview the Logframe or view the Project Fiche.



AMP TIP

When you click the "Preview" button, a summary of all the information entered from Steps 1 through 10 will be displayed on one page. If the information is previewed during the steps of editing an activity, click the "Back" button to go back to the edit mode and make any changes, or click the "Save Activity" button to save the activity's details. Click the "Print" link on the top right of the page to print the activity information.

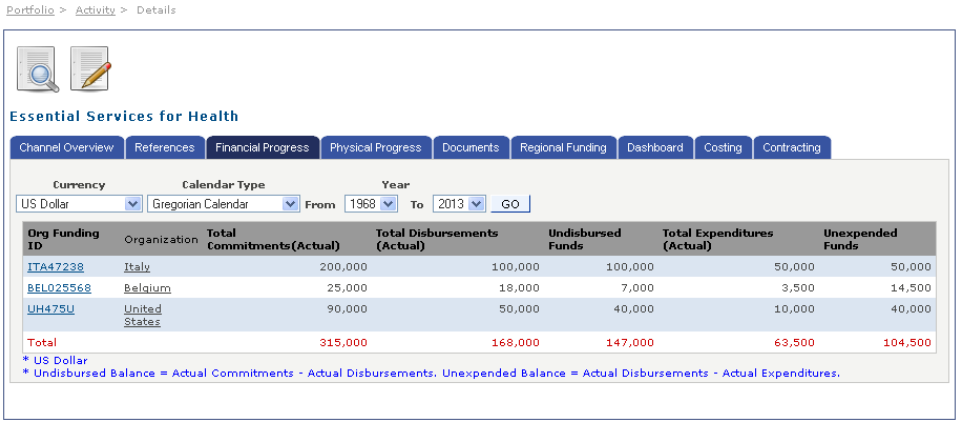
When clicking the Edit button, all information from steps 1 through 10 will be available for editing.

Screenshot 2.1 – Channel Overview

Financial Progress

This tab displays the financing breakdown of the activity by donor. It provides information on committed, disbursed, un-disbursed, expended, and unexpended funds from each donor organization, and information can be sorted using the filter for currency.

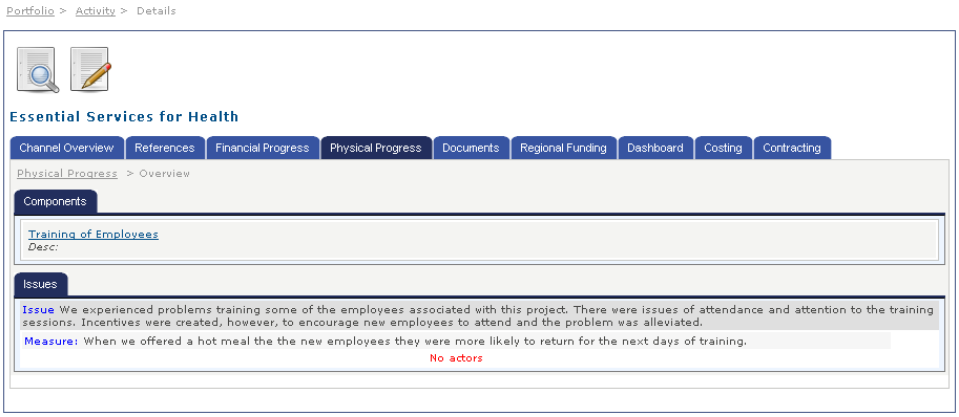
You can also view financing information from each donor by clicking the funding organization ID, which allows you to see an overview of the donor's information, yearly commitments, yearly disbursements, yearly expenditures, all (commitments, disbursements, and expenditures), discrepancy, and all discrepancies. This information can be accessed by clicking on the tabs above the "Reference Information" heading. The financing information can be sorted using the filters for currency, calendar type and year range. Quarterly information can be viewed by clicking the "Show Quarterly" link on the bottom of the page for the Disbursements, Expenditures, Discrepancy, and All tabs.



Screenshot 2.2 – Financial Progress

Physical Progress

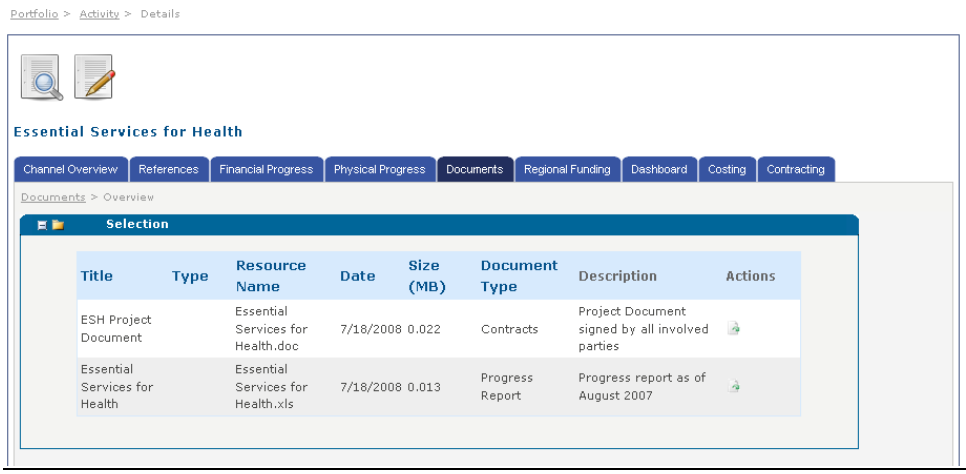
This tab allows the user to view the components and issues, including all measures and actors for the issue, related to a specific activity. Clicking on the name of a component displays the details of the component, including its financial breakdown and physical progress.


Portfolio > Activity > Details
Essential Services for Health
Channel Overview
References
Financial Progress
Physical Progress
Documents
Regional Funding
Dashboard
Costing
Contracting
Physical Progress > Overview
Components
Training of Employees
Desc:
Issues
Issue We experienced problems training some of the employees associated with this project. There were issues of attendance and attention to the training sessions. Incentives were created, however, to encourage new employees to attend and the problem was alleviated.
Measure: When we offered a hot meal the the new employees they were more likely to return for the next days of training.
No actors

Screenshot 2.3 – Physical Progress

Documents

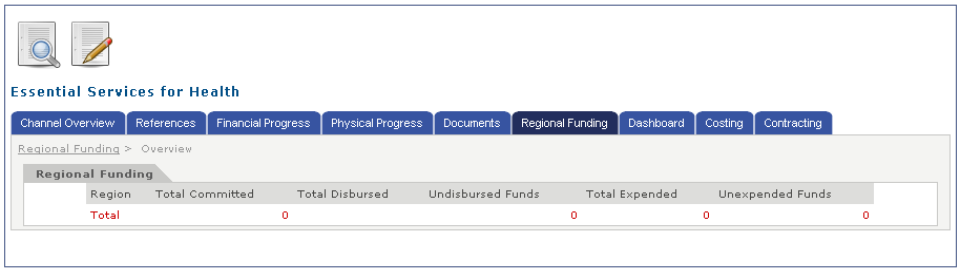
This tab displays a list of all resources related to the activity, including documents and web resources. Clicking on the link corresponding to a specific document or web resource will open the document or the web page, respectively.



Screenshot 2.4 – Documents

Regional Funding

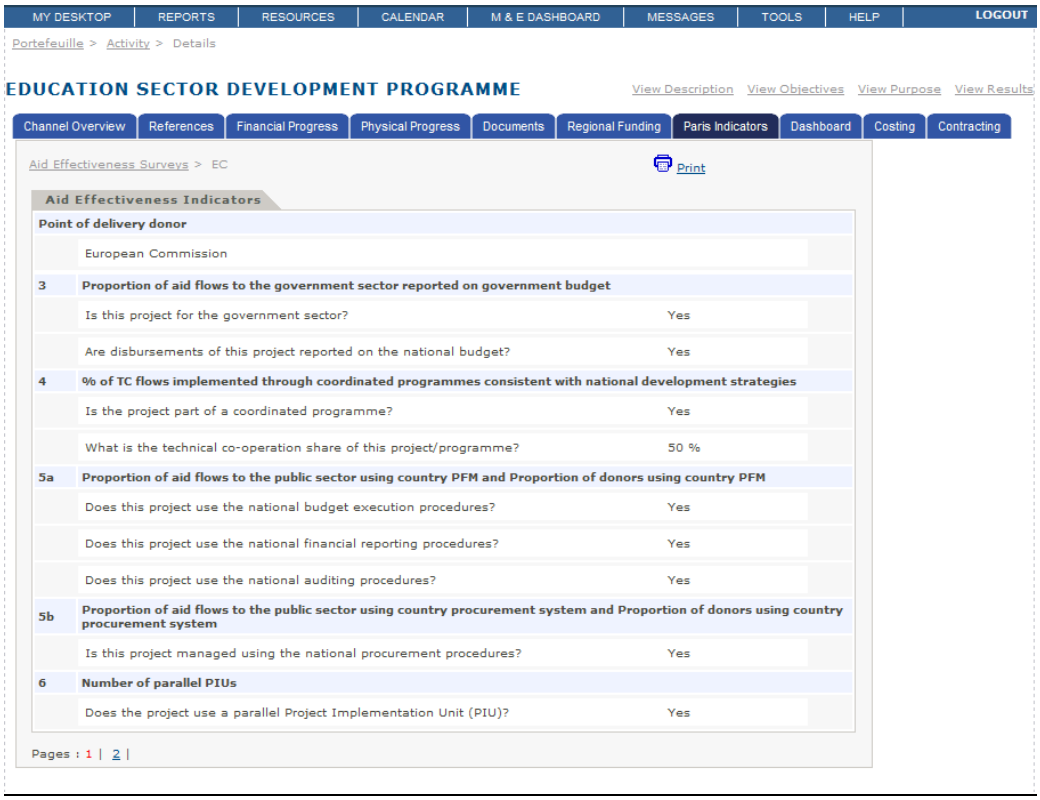
This tab displays the financial breakdown of the activity (commitments, disbursements, and expenditures) by region. You can view the financial breakdown for each region by clicking on the region's name.



Screenshot 2.5 – Regional Funding

Paris Indicators

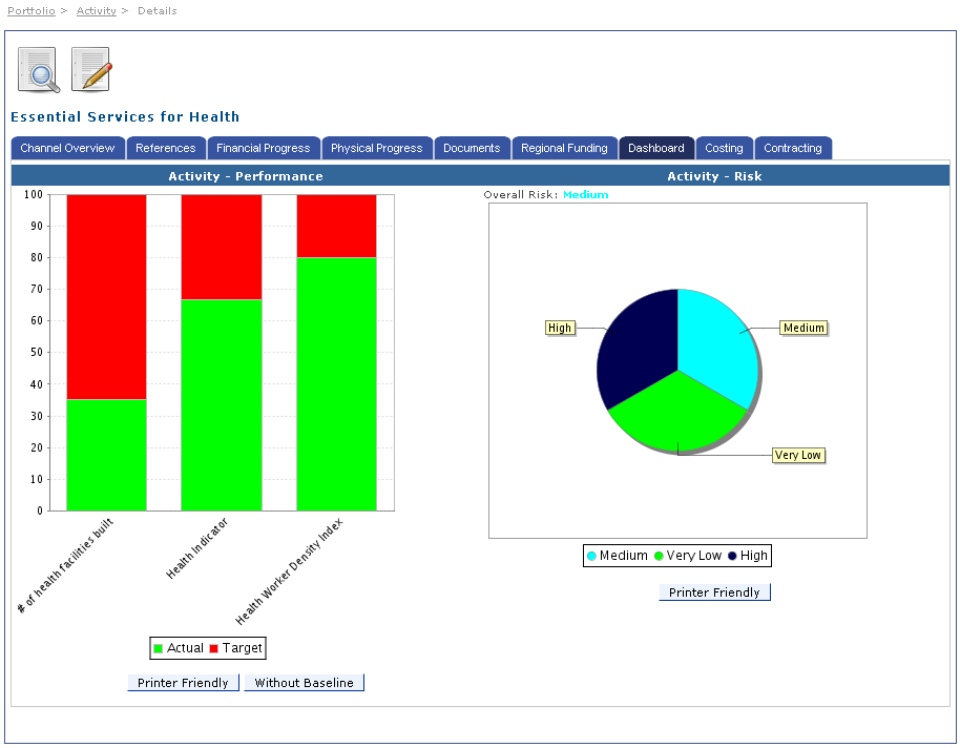
This tab displays the responses to the Aid Effectiveness Survey for the activity and the corresponding donor organization(s). All donor organizations of that activity may answer the survey. Clicking on a survey name displays the questions and the corresponding answers associated with the activity organized by donor.


MY DESKTOP
REPORTS
RESOURCES
CALENDAR
M & E DASHBOARD
MESSAGES
TOOLS
HELP
LOGOUT
Portefeuille > Activity > Details
EDUCATION SECTOR DEVELOPMENT PROGRAMME
View Description
View Objectives
View Purpose
View Results
Channel Overview
References
Financial Progress
Physical Progress
Documents
Regional Funding
Paris Indicators
Dashboard
Costing
Contracting
Aid Effectiveness Surveys > EC
Print
Aid Effectiveness Indicators
Point of delivery donor
European Commission
3 Proportion of aid flows to the government sector reported on government budget
Is this project for the government sector? Yes
Are disbursements of this project reported on the national budget? Yes
4 % of TC flows implemented through coordinated programmes consistent with national development strategies
Is the project part of a coordinated programme? Yes
What is the technical co-operation share of this project/programme? 50 %
5a Proportion of aid flows to the public sector using country PFM and Proportion of donors using country PFM
Does this project use the national budget execution procedures? Yes
Does this project use the national financial reporting procedures? Yes
Does this project use the national auditing procedures? Yes
5b Proportion of aid flows to the public sector using country procurement system and Proportion of donors using country procurement system
Is this project managed using the national procurement procedures? Yes
6 Number of parallel PIUs
Does the project use a parallel Project Implementation Unit (PIU)? Yes
Pages : 1 | 2 |

Screenshot 2.6-Paris Indicators

Dashboard

This tab displays graphs representing the performance and risk of the activity, based on selected indicators. You can choose to see the performance graph without taking into consideration the base values by clicking the "Without Baseline" button. Clicking the "Printer Friendly Version" buttons will display the graphs in a new window that is ready to print.



Screenshot 2.7 – Dashboard

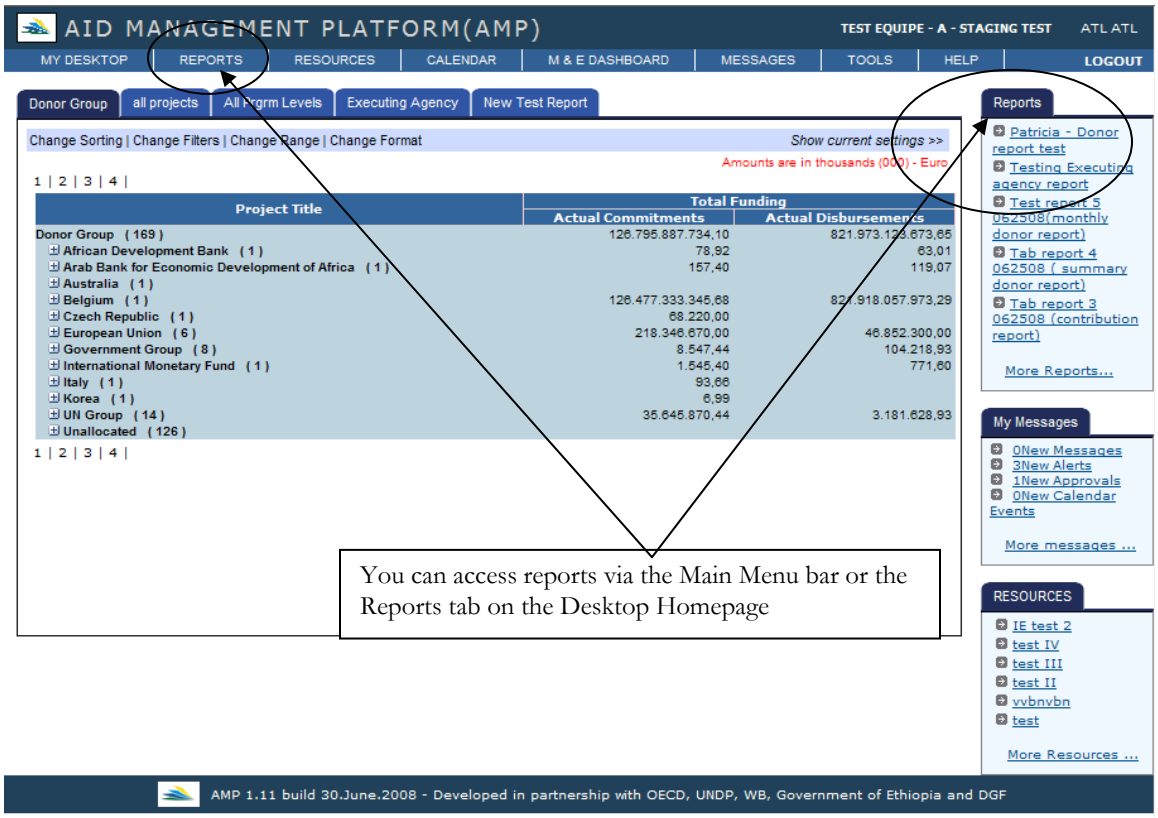
Costing

This tab displays the costing information for the project and clearly outlines the contribution gaps that exist.

REPORTING

Overview

The Reporting Module is designed to allow you to create and manage reports. In addition to having the ability to view various types of reports, one also has the ability to create customized reports that organize your data in the way you would like it presented.


AID MANAGEMENT PLATFORM(AMP)
TEST EQUIPE - A - STAGING TEST
ATL ATL
MY DESKTOP
REPORTS
RESOURCES
CALENDAR
M & E DASHBOARD
MESSAGES
TOOLS
HELP
LOGOUT
Donor Group
all projects
All Prgrm Levels
Executing Agency
New Test Report
Change Sorting | Change Filters | Change Range | Change Format
Show current settings >>
Amounts are in thousands (000) - Euro
Project Title
Total Funding
Actual Commitments
Actual Disbursements
Donor Group (169) 126.795.887.734,10 821.973.123.673,65
African Development Bank (1) 78,92 63,01
Arab Bank for Economic Development of Africa (1) 157,40 119,07
Australia (1)
Belgium (1) 126.477.333.345,68 821.918.057.973,29
Czech Republic (1) 68.220,00
European Union (6) 218.346.670,00 46.852.300,00
Government Group (8) 8.547,44 104.218,93
International Monetary Fund (1) 1.545,40 771,60
Italy (1) 93,66
Korea (1) 6,99
UN Group (14) 35.645.870,44 3.181.628,93
Unallocated (126)
Reports
Patricia - Donor report test
Testing Executing agency report
Test report 5 062508(monthly donor report)
Tab report 4 062508 (summary donor report)
Tab report 3 062508 (contribution report)
More Reports...
My Messages
0New Messages
3New Alerts
1New Approvals
0New Calendar Events
More messages ...
RESOURCES
IE test 2
test IV
test III
test II
vvbnvbn
test
More Resources ...
AMP 1.11 build 30.June.2008 - Developed in partnership with OECD, UNDP, WB, Government of Ethiopia and DGF
You can access reports via the Main Menu bar or the Reports tab on the Desktop Homepage

The Reports module can be accessed from the Desktop Homepage or from the Main Menu of AMP. Although tabs also show report type of information, tabs are not reports. Tabs should only be used to quickly find projects and for very quick overviews of the project you are locating. Reports should be used for developing extensive research and analysis information. Let us begin our review of the Reports module by understanding the various types of reports that can be created in AMP.

Report Types

AMP allows you to create four different types of reports. These various report types are:

- Donor Report
- Regional Report
- Component Report

- Contribution Report

Let's take a moment to examine the details of how each type of report is created and defined.

Donor Report (Basic Report)

The Donor report is the usually the most often used report in AMP and often referred to as a Basic Report. This report is used as a way to get an overview of Donor funding. Listed below are some basic features of a Donor Report:

- There can be a maximum of three report hierarchy levels that can be selected for a report.
- It is not required that the donor type or donor group be a required column in the report.
- This type of report is best used in hierarchies as they are most flexible of the hierarchy reports in AMP. There are no restrictions on the combination of the hierarchies that can be selected.
- The measures that can be chosen for all reports are Planned Commitments, Actual Commitments, Planned Disbursements, Actual Disbursements, Undisbursed Balance and Total Commitments[i] (for Bolivia implementation).
- For a simple report with no hierarchies the report displays totals for all the activities.
- For hierarchy reports there are subtotals per hierarchy and a grand total for all activities under all hierarchies.

(See Appendix C – Donor Reports for a detailed example of the calculations created by a Donor Report)

Regional Report

Regional reports display and aggregate the regional funding amounts for activities.
The regional funding is entered for the activity on the regional funding step. When entering regional funding the user must select a region and enter the funding for that region. The regions are selected on the location step of the activity form.

Regional reports calculate hierarchy percentages in a different manner. Since the funding is split up by the region it is always a best practice when creating these kind of reports to use region in the hierarchy. This will give the user an accurate view of how the funding amounts are split up by the sectors, programs etc.

A basic Regional Report will show the total regional funding for all the regions per activity.
For hierarchy reports the calculations differ from donor reports. *(To see more detailed examples of Regional Reports and how the hierarchies differ from Donor Reports see Appendix D – Regional Reports)*

Component Reports

Component reports display and aggregate the component funding amounts for activities. The component funding is entered for the activity on the component step. When entering component funding the user must select a component and enter the funding for that component.

Component reports calculate hierarchy percentages in a similar manner as the regional reports. Since the funding is split up by the components it is always a best practice when creating these kinds of reports to use component in the hierarchy. This will give the user an accurate view of how the funding amounts are split up by the sectors, programs etc. For simple reports the report will show the total component funding for all the components per activity. For hierarchy reports the calculations differ from donor reports. *(For detailed examples of Component reports and their calculations see Appedix E – Component Reports)*

How to Create a Report

Now that we understand the type of reports AMP can create and their purpose, let us now step through the process of creating a report.

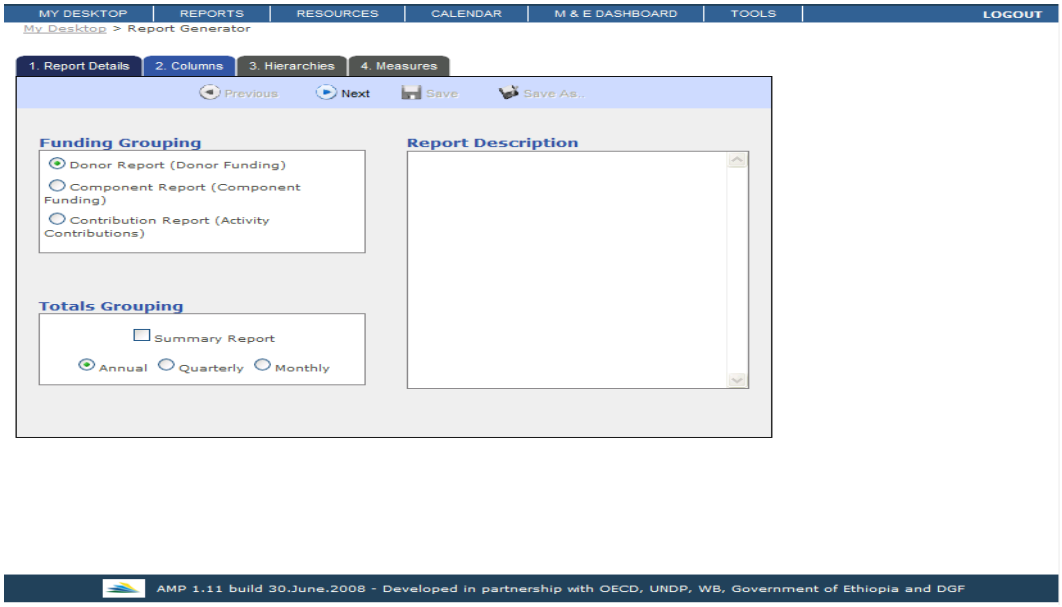
Step 1

- Click Report Generator link from the dropdown in the Reports menu bar option.

Step 2

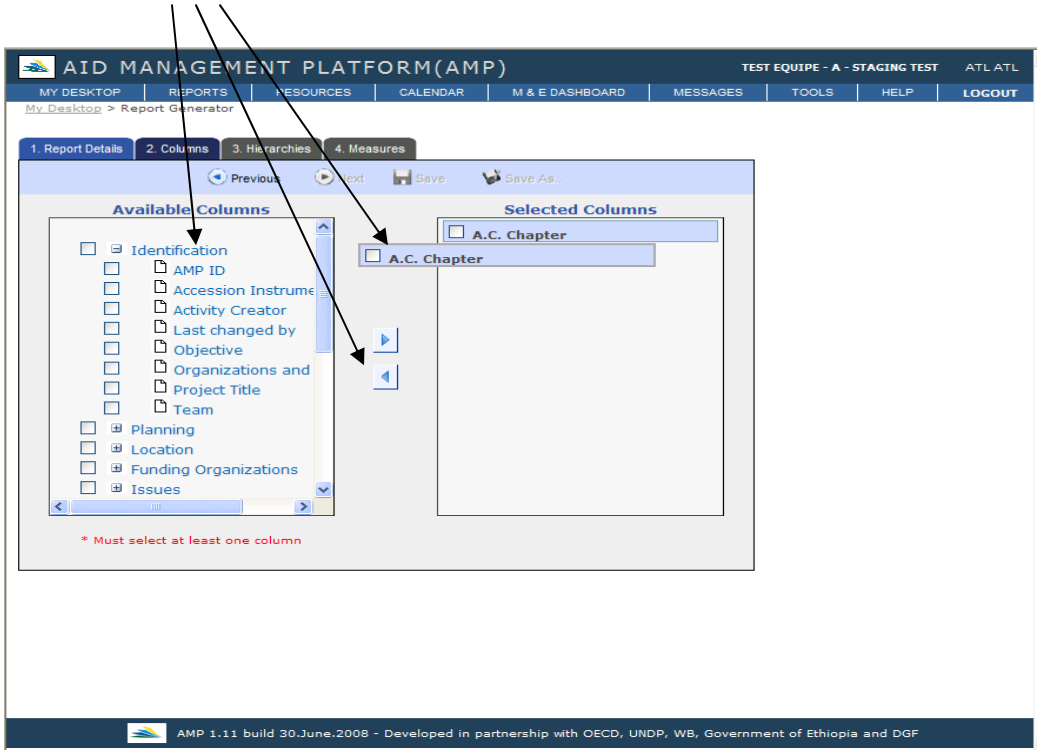
Step 1 of 4: Select Report Type, Grouping and Description

Select the type of report to be generated: Donor, Regional, Component, or Contribution. (**Information Note**: Selecting Summary Report shows only subtotals and totals without showing individual activities)



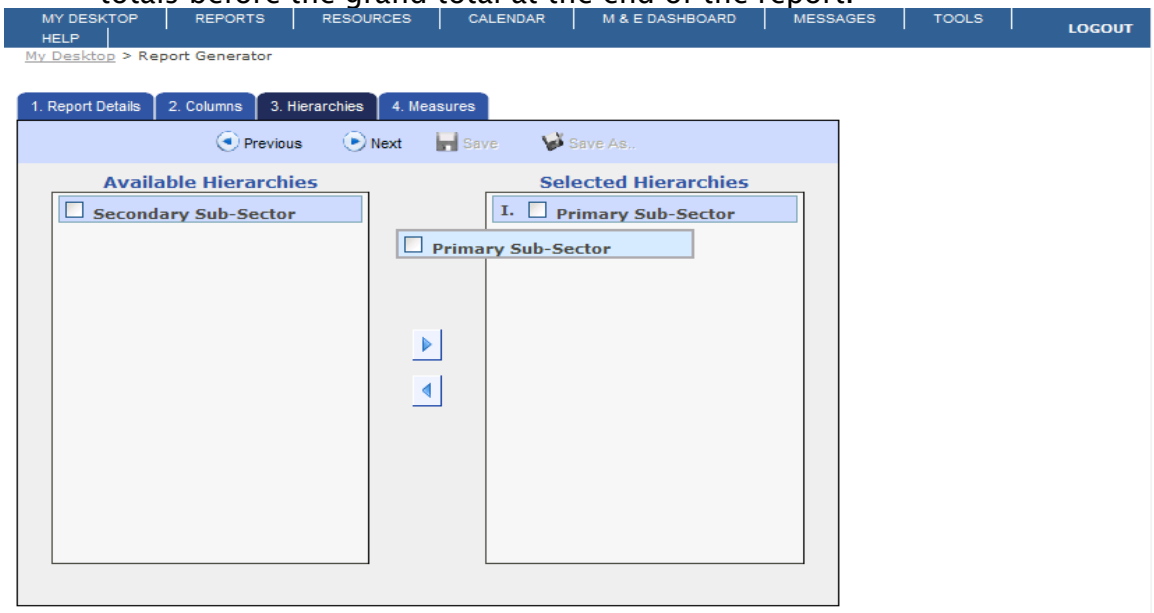
Step 2 of 4: Select Columns

- Select the columns you wish to be displayed on the report and click the corresponding arrow or drag the option to the corresponding side. The columns follow as much as possible the same classification than the 10 steps of adding/creating an activity.



Step 3 of 4: Select Rows/Hierarchies

- Select columns to add to the hierarchy and click the corresponding arrow or drag the items. The row/hierarchy represents a grouping of the funding information, like sub-totals before the grand total at the end of the report.



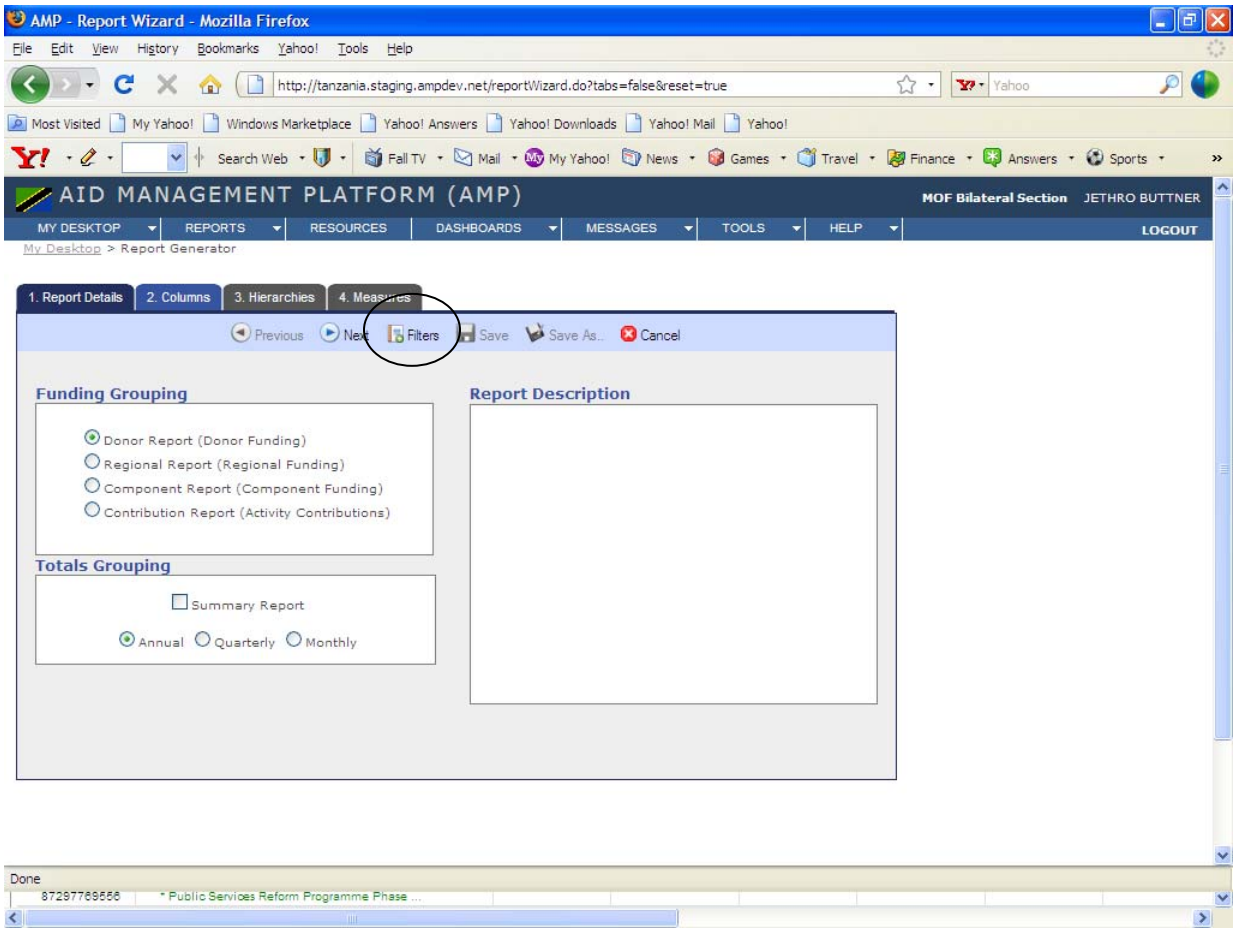
- Drag the columns up or down to move it within the hierarchy.

Step 4 of 4: Select Measures

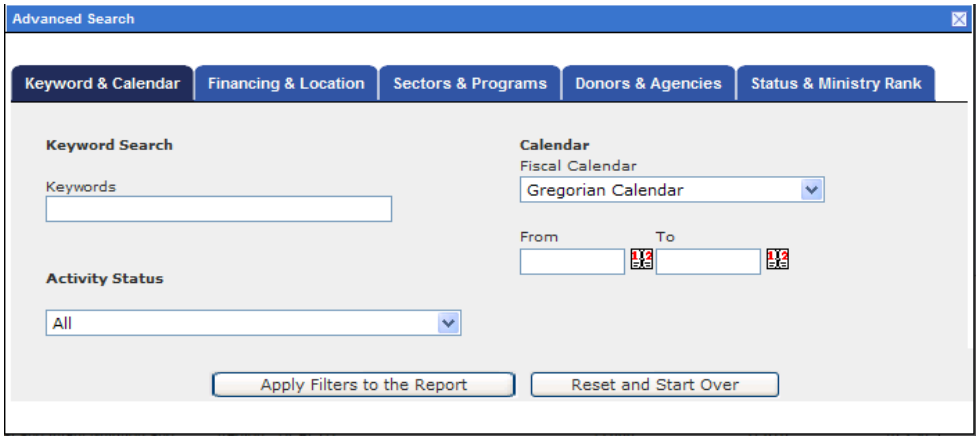
- Select the measures that you would like to be displayed in the report.

Step 5: Apply Filters (Optional)

- The user can filter a report by certain preconditions. To set filters when creating a report click on the filters icon.
-



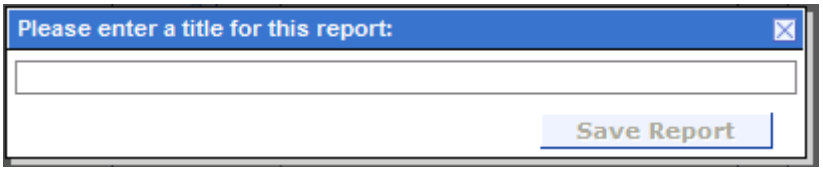
- Clicking on the icon will bring up the filter's popup box. Details of the filter box are discussed in a later section.



Step 6: Save or Save As

When you click Save or Save As you will get the following:

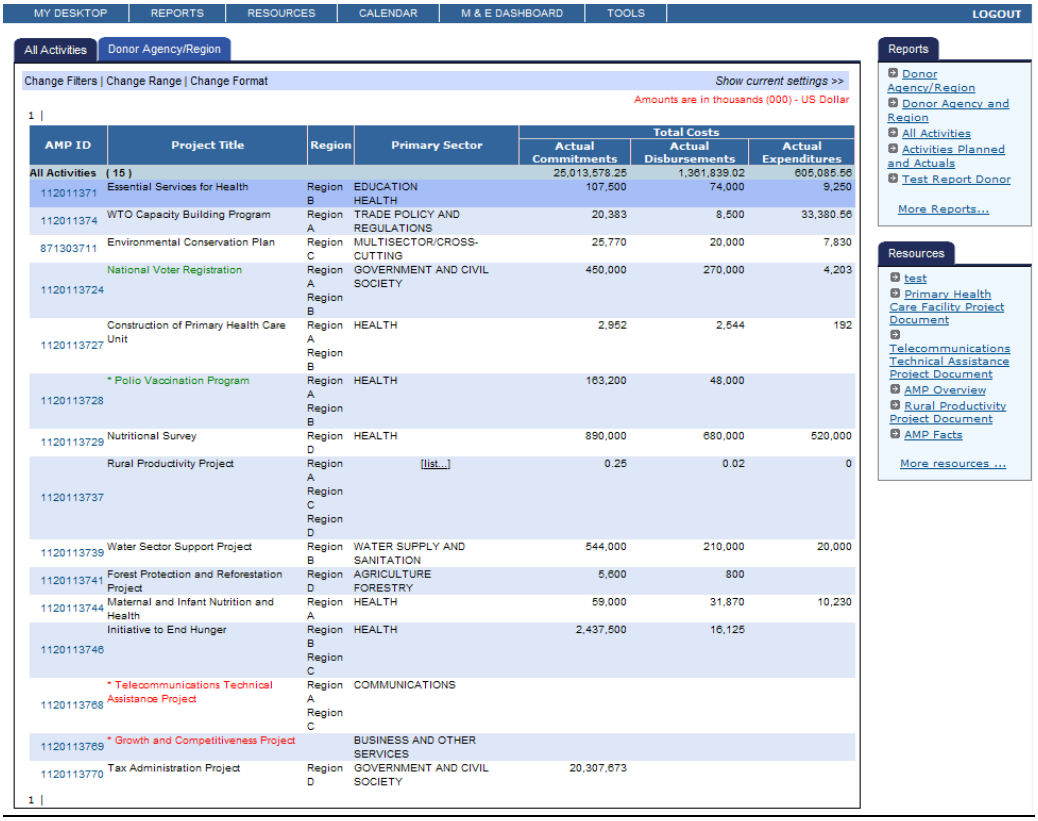
- Enter a title and a description for the report (* = required)

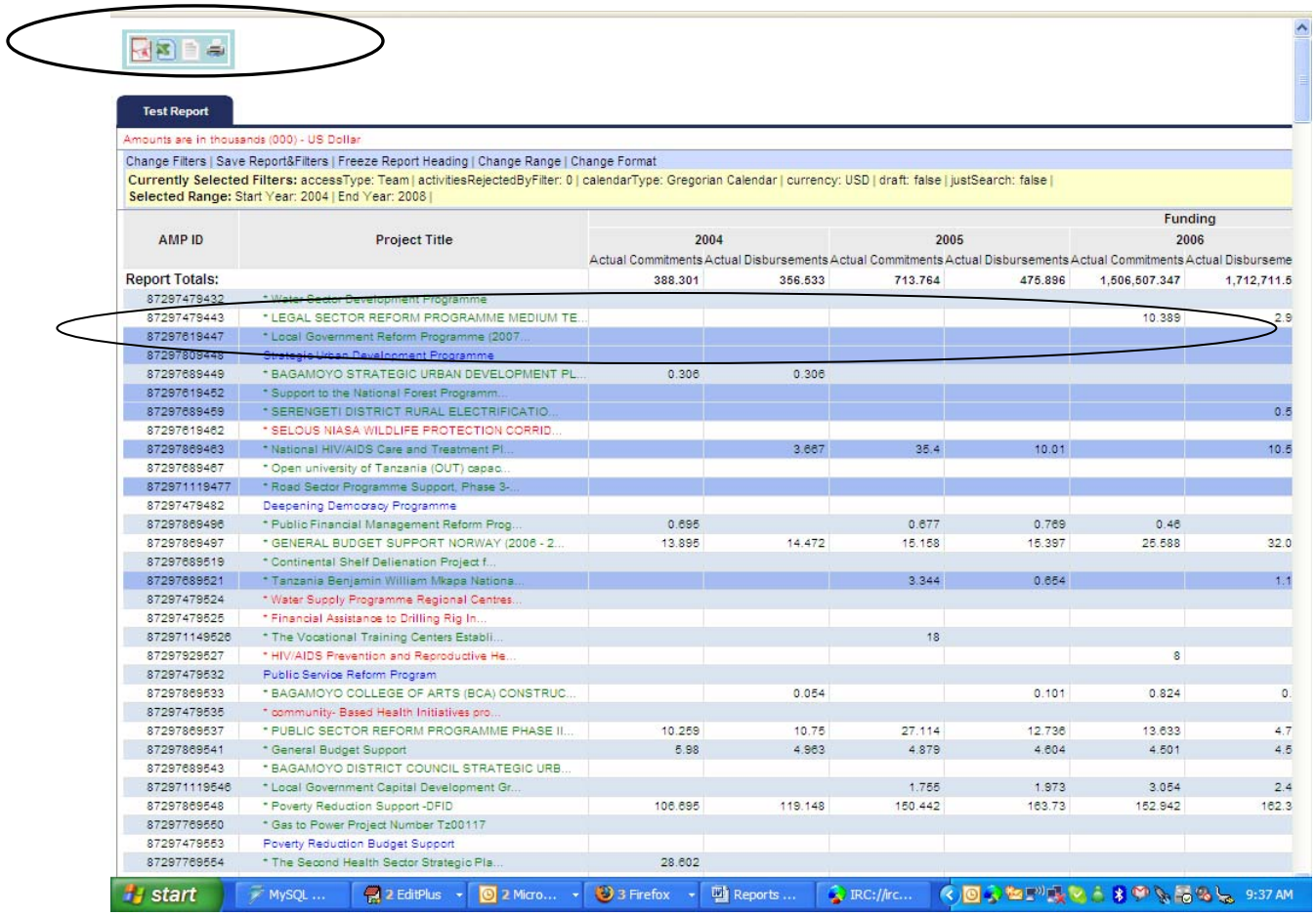


This will be the title for your report. The difference is that "Save" is used to often save a new report. "Save As" can be used to open an existing report and modify some selections and then save the same report as a different name without having to create a new report.

2. Viewing a Report

The last five (5) reports opened by the user are accessible from the Desktop Homepage, in the upper-left corner under the "Reports" section. Reports can also be viewed from the Reports tab. To view a report, click on its name.


MY DESKTOP
REPORTS
RESOURCES
CALENDAR
M & E DASHBOARD
TOOLS
LOGOUT
All Activities
Donor Agency/Region
Change Filters | Change Range | Change Format
Show current settings >>
Amounts are in thousands (000) - US Dollar
1 |
AMP ID
Project Title
Region
Primary Sector
Total Costs
Actual Commitments
Actual Disbursements
Actual Expenditures
All Activities (15) 25,013,578.25 1,361,839.02 605,085.56
112011371 Essential Services for Health Region B EDUCATION HEALTH 107,500 74,000 9,250
112011374 WTO Capacity Building Program Region A TRADE POLICY AND REGULATIONS 20,383 8,500 33,380.56
871303711 Environmental Conservation Plan Region C MULTISECTOR/CROSS-CUTTING 25,770 20,000 7,830
1120113724 National Voter Registration Region A Region B GOVERNMENT AND CIVIL SOCIETY 450,000 270,000 4,203
1120113727 Construction of Primary Health Care Unit Region A Region B HEALTH 2,952 2,544 192
1120113728 * Polio Vaccination Program Region A Region B HEALTH 163,200 48,000
1120113729 Nutritional Survey Region D HEALTH 890,000 680,000 520,000
1120113737 Rural Productivity Project Region A Region C Region D [list...] 0.25 0.02 0
1120113739 Water Sector Support Project Region B WATER SUPPLY AND SANITATION 544,000 210,000 20,000
1120113741 Forest Protection and Reforestation Project Region D AGRICULTURE FORESTRY 5,600 800
1120113744 Maternal and Infant Nutrition and Health Region A HEALTH 59,000 31,870 10,230
1120113746 Initiative to End Hunger Region B Region C HEALTH 2,437,500 16,125
1120113768 * Telecommunications Technical Assistance Project Region A Region C COMMUNICATIONS
1120113769 * Growth and Competitiveness Project BUSINESS AND OTHER SERVICES
1120113770 Tax Administration Project Region D GOVERNMENT AND CIVIL SOCIETY 20,307,673
1 |
Reports
Donor Agency/Region
Donor Agency and Region
All Activities
Activities Planned and Actuals
Test Report Donor
More Reports...
Resources
test
Primary Health Care Facility Project Document
Telecommunications Technical Assistance Project Document
AMP Overview
Rural Productivity Project Document
AMP Facts
More resources ...



Test Report

Amounts are in thousands (000) - US Dollar

Change Filters | Save Report&Filters | Freeze Report Heading | Change Range | Change Format

Currently Selected Filters: accessType: Team | activitiesRejectedByFilter: 0 | calendarType: Gregorian Calendar | currency: USD | draft: false | justSearch: false |

Selected Range: Start Year: 2004 | End Year: 2008 |

AMP ID	Project Title	Funding					
		2004		2005		2006	
		Actual Commitments	Actual Disbursements	Actual Commitments	Actual Disbursements	Actual Commitments	Actual Disburseme
Report Totals:		388.301	356.533	713.764	475.896	1,506,507.347	1,712,711.5
87297479432	* Water Sector Development Programme						
87297479443	* LEGAL SECTOR REFORM PROGRAMME MEDIUM TE...					10.389	2.9
87297619447	* Local Government Reform Programme (2007...						
87297689448	* Strategic Urban Development Programme						
87297689449	* BAGAMOYO STRATEGIC URBAN DEVELOPMENT PL...	0.306	0.306				
87297619452	* Support to the National Forest Programm...						
87297689459	* SERENGETI DISTRICT RURAL ELECTRIFICATIO...						0.5
87297619462	* SELOUS NIASA WILDLIFE PROTECTION CORRID...						
87297689463	* National HIV/AIDS Care and Treatment Pl...		3.667	35.4	10.01		10.5
87297689467	* Open university of Tanzania (OUT) capac...						
87297119477	* Road Sector Programme Support, Phase 3-...						
87297479482	Deepening Democracy Programme						
87297869496	* Public Financial Management Reform Prog...	0.695		0.677	0.769	0.46	
87297869497	* GENERAL BUDGET SUPPORT NORWAY (2006 - 2...	13.895	14.472	15.158	15.397	25.588	32.0
87297689519	* Continental Shelf Delienation Project f...						
87297689521	* Tanzania Benjamin William Mkapa Nationa...			3.344	0.654		1.1
87297479524	* Water Supply Programme Regional Centres...						
87297479525	* Financial Assistance to Drilling Rig In...						
87297114526	* The Vocational Training Centers Establi...			18			
87297929527	* HIV/AIDS Prevention and Reproductive He...					8	
87297479532	Public Service Reform Program						
87297869533	* BAGAMOYO COLLEGE OF ARTS (BCA) CONSTRUC...		0.054		0.101	0.824	0.
87297479535	* community- Based Health Initiatives pro...						
87297869537	* PUBLIC SECTOR REFORM PROGRAMME PHASE II...	10.259	10.75	27.114	12.736	13.633	4.7
87297869541	* General Budget Support	5.98	4.963	4.879	4.604	4.501	4.5
87297689543	* BAGAMOYO DISTRICT COUNCIL STRATEGIC URB...						
87297119546	* Local Government Capital Development Gr...			1.755	1.973	3.054	2.4
87297869548	* Poverty Reduction Support -DFID	106.695	119.148	150.442	163.73	152.942	162.3
87297769550	* Gas to Power Project Number Tz00117						
87297479553	Poverty Reduction Budget Support						
87297769554	* The Second Health Sector Strategic Pla...	28.602					

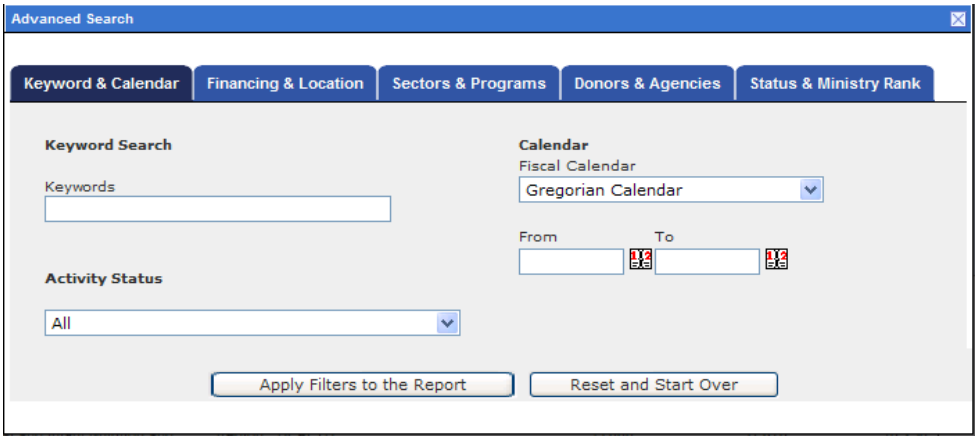
start | MySQL ... | 2 EditPlus | 2 Micro... | 3 Firefox | Reports ... | IRC://irc... | 9:37 AM

- The user may select a particular row in the report by clicking on the row. This highlights the row with a darker shared of blue which helps the user scroll horizontally and mark the activity rows he/she is interested in viewing.
- The yellow bar displays all the applied filters. This bar may be expanded or collapsed using the “Show more information” or “Hide more information” link on the blue bar.
- Click on the “Change Filters” link to apply a filter to a report. One may save the report with a filter by clicking the “Save Reports & Filter”.
- To change the range of years that appears in the report click on the “Change Range” link.
- To change the format of the amounts (number format) in the report click on the “Change Format” Link
- To freeze the report column headings i.e. to keep the Report Heading static and scroll through the report body click on the “Freeze Column Headings” icon. The user may revert back at any time by clicking the “Unfreeze Report Headings” link that appears once the user click the freeze report headings link.

- Once you open a report, the report can also be viewed and saved in PDF, XLS, or CSV by clicking the "Export to PDF", "Export to XLS", or "Export to CSV" links, respectively, on the top left of the page. A printer-friendly version of the report is also available.

- The "Report Totals" are the grand totals of all the amounts in a report. Hierarchy report will contain sub totals per hierarchy. This is discussed in detail below with report types and report calculations.

- By default, all existing filters are already turned on and all projects appear in a report. Filters allow you to select the types of projects you want to see.



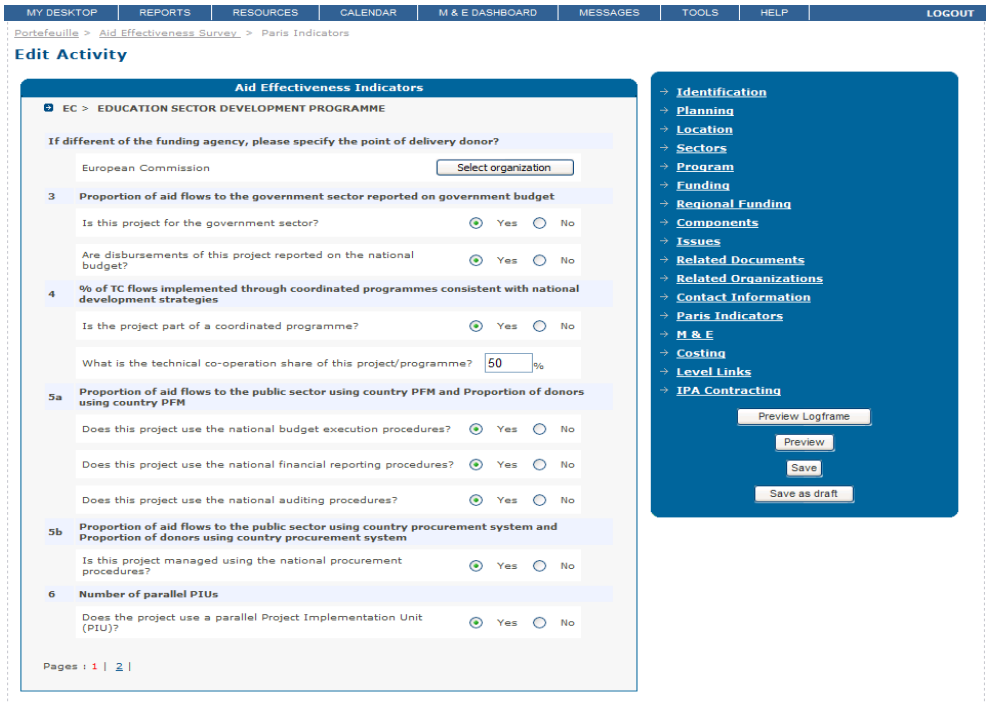
PARIS INDICATORS

The Paris Indicators module allows donors to survey each individual activity against aid effectiveness-related questions, and, by aggregation, to calculate automatically the Indicators of the Paris Declaration on Aid Effectiveness. For more information on Paris Indicators, see http://www.aidharmonization.org/.

Entering Paris Indicators

Let's review how to enter and view Paris Indicators for an activity. Donors may enter Paris Indicators for an activity by clicking the activity name on the Desktop Portfolio.

- On the Channel Overview tab, click Edit.
- Click Paris Indicators on the menu on the left side of the page.
- Click on the Aid Effectiveness Survey ID.
- Click on "Yes" or "No" to answer each question in the survey. For some questions, you may have to enter a value in a textbox.
- After answering all the questions in the survey, click Preview to view the survey with the answers, or click Save to save the survey answers.

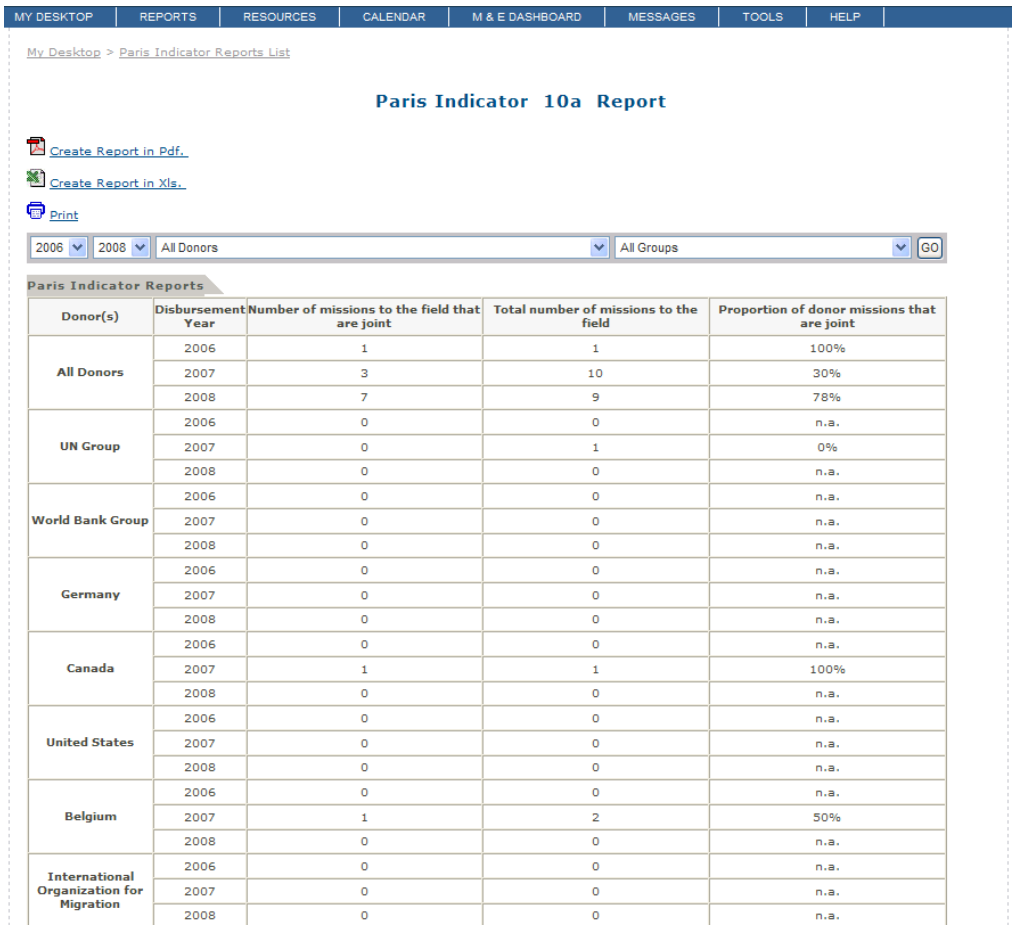


Screenshot 3.1 – Entering Paris Indicators

Paris Indicator Reports

To view Paris Indicator reports, click on Paris Indicator Reports in the Reports section of the Desktop Portfolio.

- In the list of Paris Indicator reports, click the indicator name to view a report on that indicator for all activities.
- Results can be sorted using filters for start year, end year, calendar type, perspective, currency, donor, status, groups, financing instruments, and sectors. Click Go to run the filters.
- To create the report in PDF or XLS formats, click the "Create report in PDF" or "Create report in xls" links, respectively.
- To print the report, click Print.



Donor(s)	Disbursement Year	Number of missions to the field that are joint	Total number of missions to the field	Proportion of donor missions that are joint
All Donors	2006	1	1	100%
	2007	3	10	30%
	2008	7	9	78%
UN Group	2006	0	0	n.a.
	2007	0	1	0%
	2008	0	0	n.a.
World Bank Group	2006	0	0	n.a.
	2007	0	0	n.a.
	2008	0	0	n.a.
Germany	2006	0	0	n.a.
	2007	0	0	n.a.
	2008	0	0	n.a.
Canada	2006	0	0	n.a.
	2007	1	1	100%
	2008	0	0	n.a.
United States	2006	0	0	n.a.
	2007	0	0	n.a.
	2008	0	0	n.a.
Belgium	2006	0	0	n.a.
	2007	1	2	50%
	2008	0	0	n.a.
International Organization for Migration	2006	0	0	n.a.
	2007	0	0	n.a.
	2008	0	0	n.a.

Screenshot 3.2 – Viewing Paris Indicators

RESOURCES

Overview

The Resource Manager allows you to store documents and links that can be shared with your team or used privately if stored in the My Documents Section of the Document Manager. A useful feature of this feature is that you can also add documents to AMP and mark them for public viewing. This allows you to share key information with non registered users of the AMP system.

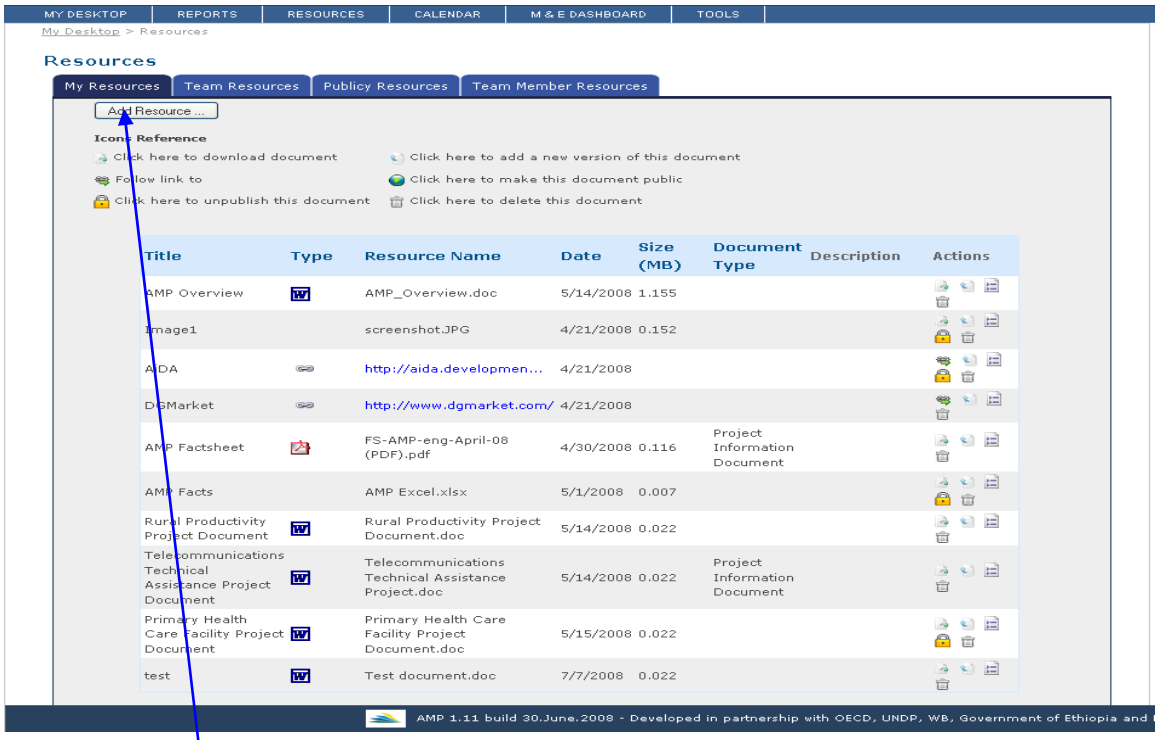
(Note: Only the Workspace Manager of a Management Workspace can share documents with the public)

Let's step through the key features of the Resource Manager.

Resource Manager Homepage (RMH)

When accessing the main page of the Resource Manager, you will have a selection area for My Resources, Team Resources, Public Resources and Team Member Resources.

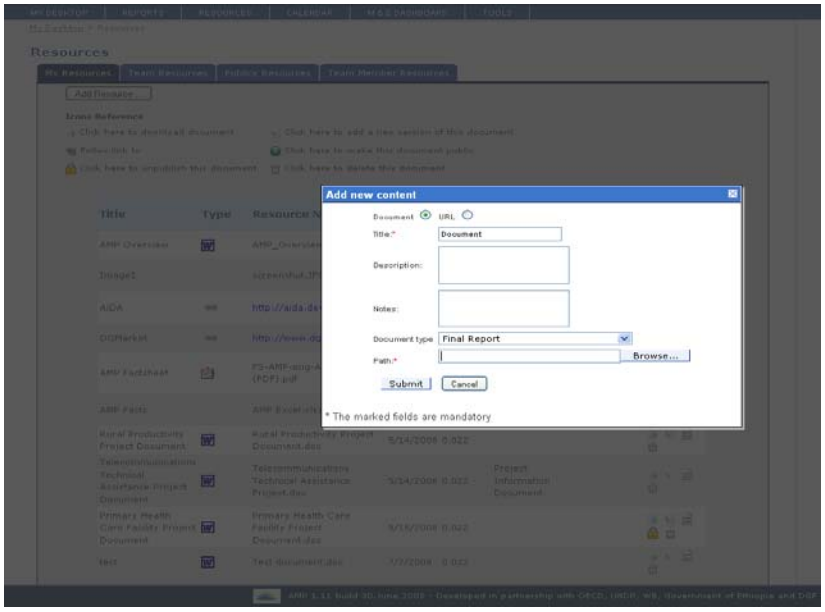
My Resources allows you to store documents in AMP that are available for your viewing and use via the AMP Resource Management system. *Team Resources* are documents that will be made available for viewing and revision by the team. *Public Resources* are those available to the public from your workspace and *Team Member Resources* allows you to view the resources of Team Members.



1. Add Document

Step 1

- Click Add File



1. Enter document information (* = required field)
2. Browse to find document or enter file path
3. Click Submit

Information Note: If your file path is invalid, your document will not be added to the Document Manager. So, a sure fire way to quickly add accurate information is to use the Browse button to find the document you wish to add.

2. Download a Document

Step 1

- Click Download (located in Action Column of document

Step 2

- Click Open

3. Add Version

Step 1

- Click Add Version (located in Actions Column of document)
- Action Panel will appear with pre-populated Title and Description (if one exists) of document

Step 2

- *Follow procedures outlined in diagram located in Step1 – Add Document*

4. Delete Document

Step 1

- Click Delete (located in Actions Column)

Step 2

- Click Yes to approve document deletion (click Cancel to discontinue deletion)

Information Note: When you delete a document, you are deleting all versions of the document, including the original.

Additional Document View

You also have the ability to view all the documents of a Workspace Member (that are available for viewing), your Team and Public Documents.

CALENDAR

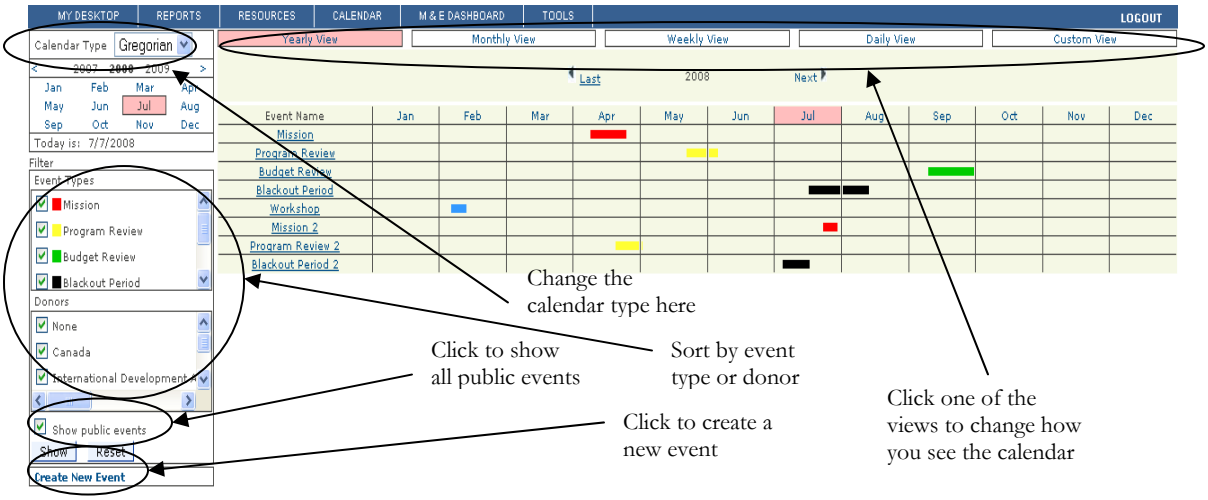
Overview

The Calendar Module enables the user to create a planning calendar to coordinate and share information on different types of events, such as missions, site visits, workshops, etc. The calendar shows overlapping events and what types of events they are.

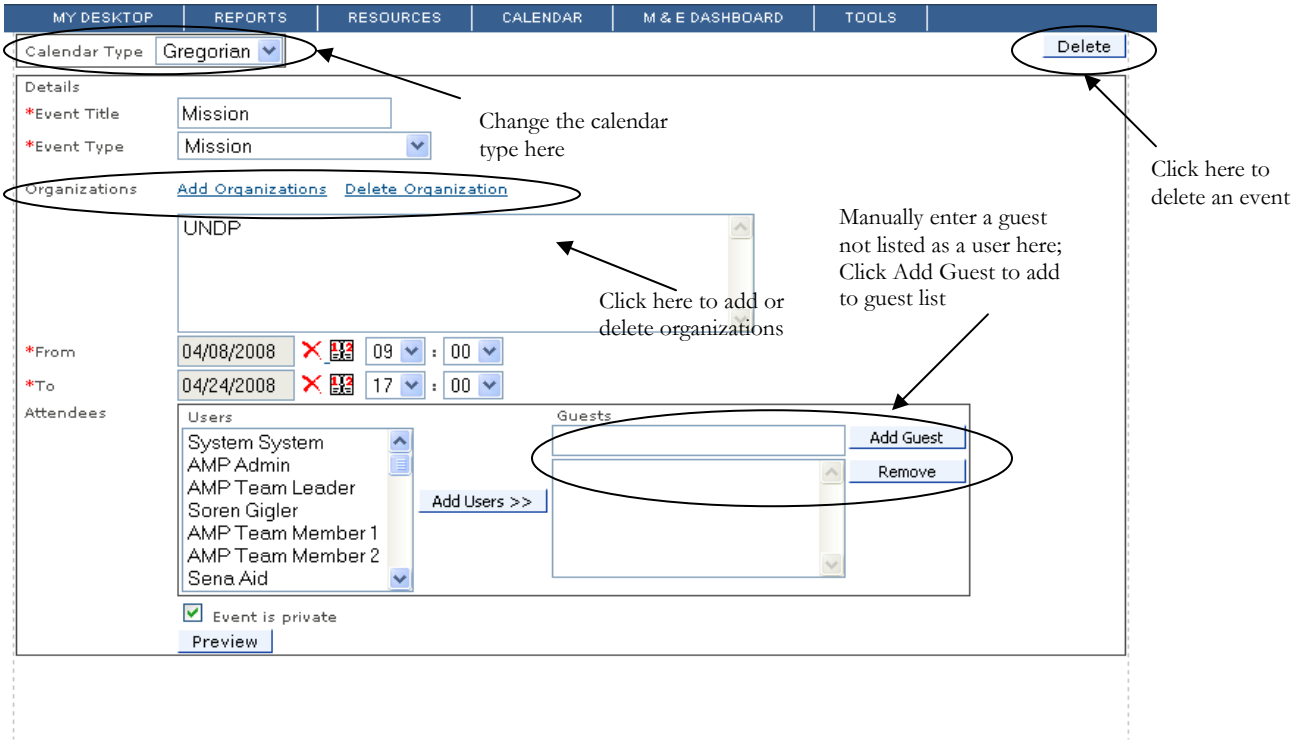
1. Viewing Events

When you click the Calendar module, you are taken to the main calendar page.

- By default, none of the events are shown on the calendar. The user has to click on the "Show" button to see them (and select "Show public events" to see those). Any event that matches the donor and event type selected above will be shown.
- All events that have been entered into the calendar can be viewed on the Calendar page in different views.
- The user can switch views by clicking the corresponding buttons on the top of the page.
- The user can also click on dates or months on the calendar on the top left of the page to view events from a particular date or month, and select the calendar type.
- Finally, the user can also sort the information by using the various filters on the left side of the screen.



2. Creating and Editing Calendar Events



Creating a New Event

To add a new event to the calendar, click Create new event on the bottom left side of the page.

- On the new page that is displayed, enter the event title and select an event type from the drop-down menu.
- Click on Add Organization to add an organization. In the pop-up window that appears, select the desired organization(s) from the list of search results and click the Add button.
- Select the date and time for the beginning and end of the event. To enter a date, click on the calendar icon, and then click on the correct date.
- Enter the names of attendees by selecting from the list and clicking the Add Users button. To select several attendees on the list, press down the CTRL button while clicking on the names on the list.
- Enter the name of any guests and click the Add Guest button.
- When all information has been entered, click the Preview button.
- On the preview page, click Save to save the event to the calendar, or click the Edit to change the information displayed.

Modifying Events

- To modify an event, click on the event's name in the calendar.

Deleting Events

- To delete an event, click on the event's name in the calendar. In the new page that appears, click Delete on the top right corner.

MONITORING & EVALUATION DASHBOARD

Overview

The Monitoring and Evaluation Module enables the user to see the impact of a project by measuring its performance against the target and monitoring the risk of the project.

Definitions of fields in this step:

Global indicator	Indicators available to all activities
Base Value	The value of the indicator since monitoring began
Target Value	The goal value of the indicator
Current Value	The value of the indicator at the time of reporting

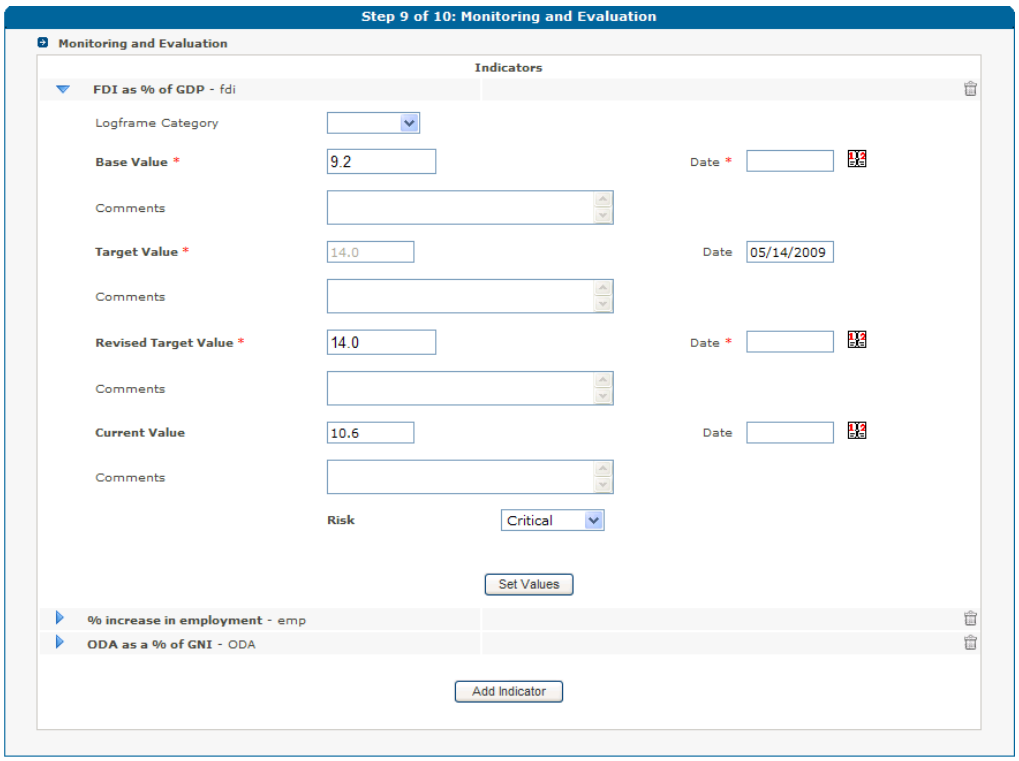
1. Adding Monitoring and Evaluation Information

Step 1

- Click Add an activity link on the Desktop Portfolio, and enter all relevant information up to Step 9.

Step 2

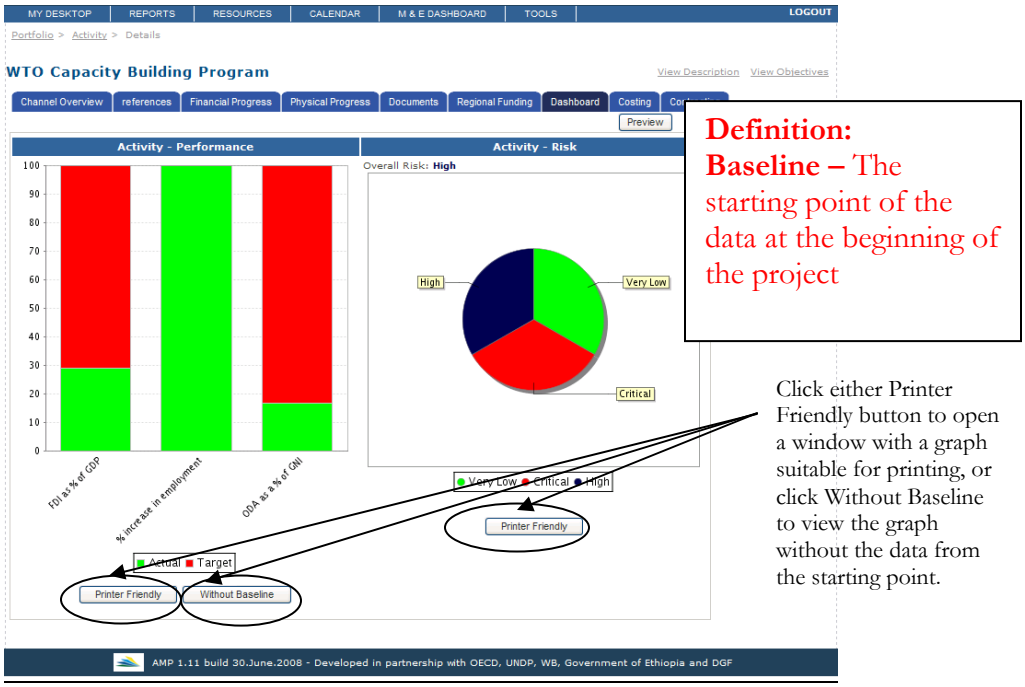
- All the global indicators appear. To enter data for any of them, click the blue triangle in front of the indicators name. All fields marked with a * are required.



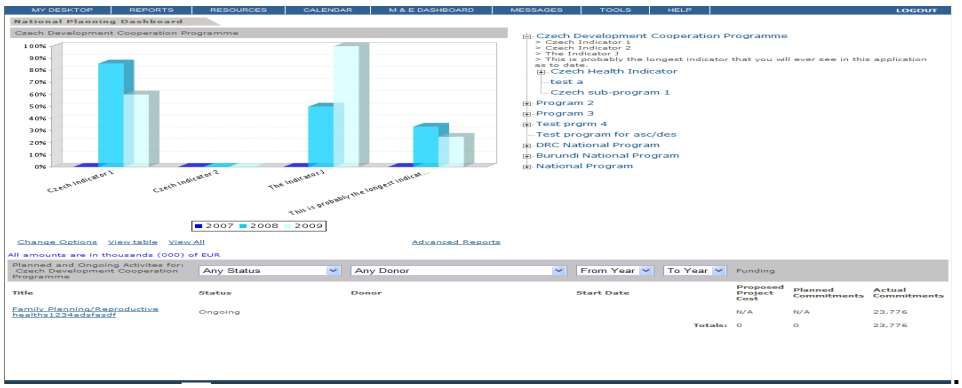
- Enter the base, target, and current values for the corresponding indicator in the textboxes.
- Enter dates for the base, target, and current values by clicking on the calendar icons, then clicking on the correct date.
- Enter any relevant comments in the "Comments" textbox.
- Select a risk level from "Risk" drop-down menu.
- After entering this information, click the "Set Values" button and select another indicator if needed.

2. Viewing Monitoring and Evaluation Information

- To view information on the performance and risk of a specific activity, click on the activity name, and then click on the "Dashboard" tab.



- To view performance and risk information for all activities, click the "M&E Dashboard" tab at the top of the page.



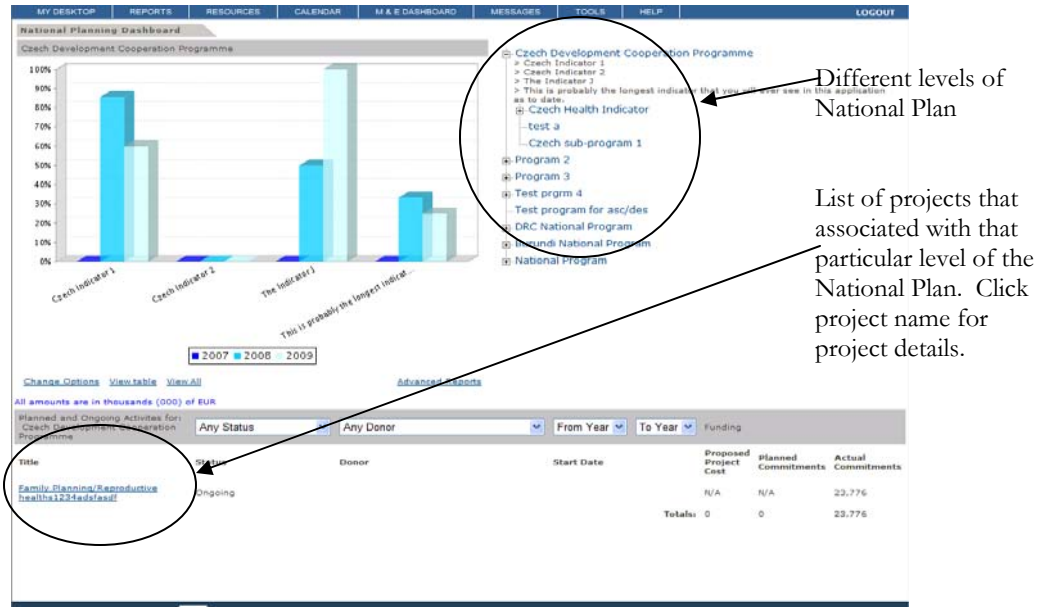
- In the "Portfolio – Performance" graph only Global indicators for which data have been entered in at least one activity in the portfolio are displayed. The actual values displayed in green for each indicator are the average number of the actual values entered in the activities for that indicator.
- The "Portfolio – Risk" graph shows the proportion of the risk levels among all activities that have set values for the indicators. Clicking on each different section of the pie chart will bring you to the activities from which the values come from.

3. National Planning Dashboard

Viewing National Planning Dashboard

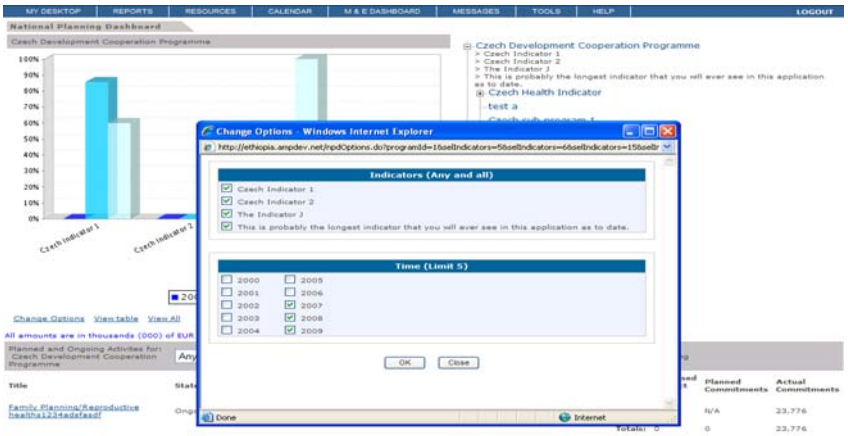
To view performance and risk information for all activities, as well as visualize progress towards national planning objectives and view progress towards objectives at multiple levels, click the corresponding link for National Planning Dashboard.

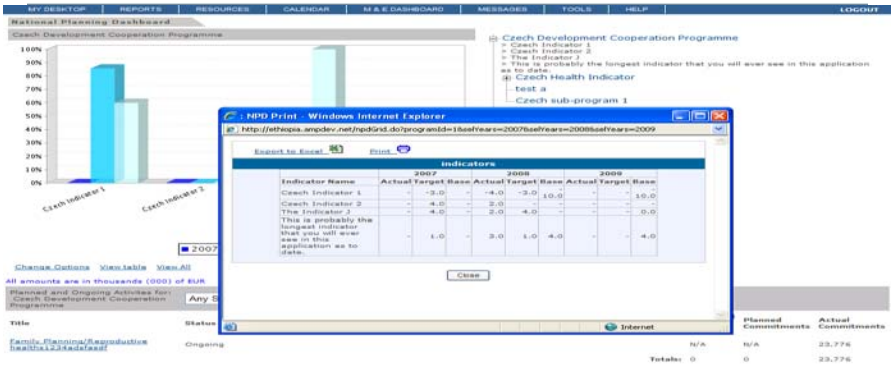
- To view the progress of indicators for the national plan, click the level that you wish to view. When you click on the level, all of the indicators will display below the name of the level, and the dashboard will show the data for those indicators.


Different levels of National Plan
List of projects that associated with that particular level of the National Plan. Click project name for project details.

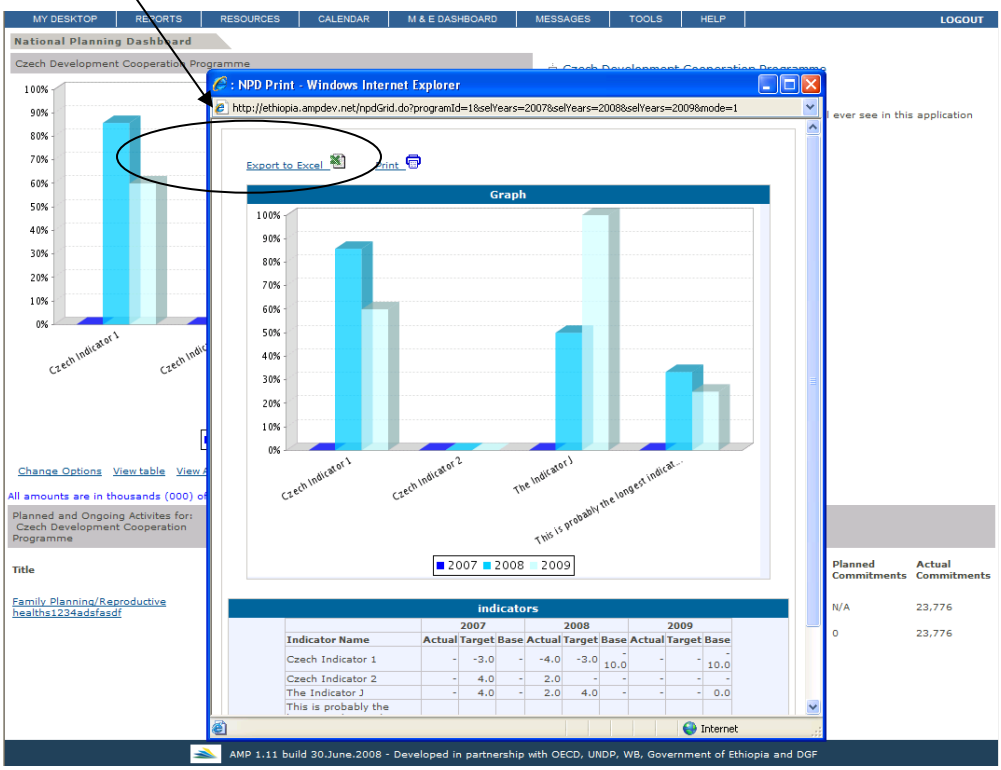
To change the dates of the data in the dashboard, select "Change Options". A pop-up box will appear enabling you to select the following:

- The indicators you wish to be displayed in the dashboard
- The time span (years) you would like to be displayed (up to five years).





- To view all of the data points in the dashboard, select “View Table”
- To view the data points and the dashboard on the same screen, select “View All”.
- To export to Excel or print the dashboard, select Export to Excel or Print.



Linking projects to the National Plan

For the National Planning Dashboard to be used effectively, it is important to be able to identify which projects (planned, ongoing, completed, etc.) contribute to the objects of a level of the National Plan. This is done in the project edit mode, Step 3. To link a project to a level of the National Plan, click Add program.

MESSAGES

Overview

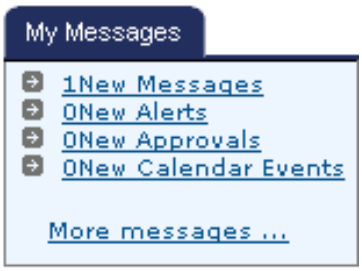
The Messaging Module is designed to allow you send private messages to other AMP users and to be informed of Alerts and Warnings. Below are the definitions for various alerts and messages:

- **An Alert**
  - System generated message (i.e. Activity is approaching final disbursement date)
  - Message created by user and set as an Alert. (i.e. Activity needs to be updated)
  - Message sent by another user/team leader set as an alert. (i.e. please create the activity ASAP.)

- **A Message with a sender and a recipient**
  - A short message between users in a single workspace or multiple workspaces for communication purposes (i.e. Please approve the changes to my activity)

- **A Calendar Event**
  - This will be based off the user's Calendar (i.e. Trip to Burundi for needs assessment)

- **An approval**
  - Team member will receive messages on approvals for the activities created by them (i.e. "Team leader 1 Activity has been approved")
  - Team leader will receive messages on pending approvals (i.e. Activity is pending approval)



The "My Messages box will display the number of new messages in each category. new messages of all types.

Click on more to go to the Messaging module page.

Clicking on the individual links will take the user to the required tab on the message module page.

The "Add Message" button will enable the user to create new messages tasks, alerts etc

Message Systems Page

Message Module
Messages
Alerts
Approvals
Calender Events
Inbox | Sent | Draft
Show more information >>
FW: FWD: FWD: FWD: lets see if the long message is fix
FW: FWD: FWD: lets see if the long message is fixed
lets see if the long message is fixed
testing long message
FW: FWD: FWD: test
tooooooooodfkdfqkjqdfqkjdqkjdkqjdkqjkdqjdkfqjdkqjdf
FW: FWD: Actvitiy atm1 from test equipe is pending app
Pages: 1| 1of1
Delete Selected Messages

- The Alerts tab will display System generated messages and all messages tagged as alerts.
- Unread Alerts will be displayed in bold in red.
- The Edit link will open up the Alert message in edit mode. This will be further explained in detail in another slide.
- The expand/collapse buttons allow the user to preview the message.
- Clicking the delete link will prompt the user if he wants to delete the Alert. If yes then it will be permanently deleted.
- Click on the Subject link to be redirected to the activity if the Alert is activity related and the user will be redirected to the Activity Channel overview page

Approvals Tab

- Click on the forward link to be redirected to the Add/Edit message page. The user can edit the approval message and forward it to another user
- Click on the approval link to be redirected to the activity channel over view page
- Click on the expand button to view the activity amp id and details of the approval date and the approver.
- Click on delete link to delete the approval message.

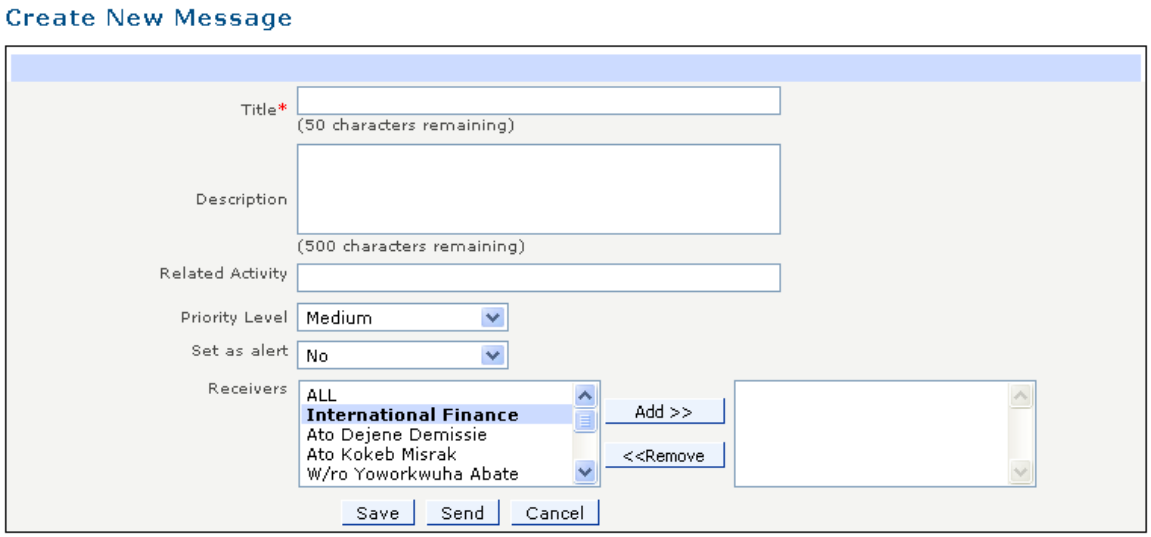
Events Tab

- Click on the description of the event link to go to the calendar page for more details of the event

- Click on the forward link to forward the message to another team member. The event can be sent as a message to another user or self to show up in the alert box

Messages Form

Create A New Message



- This user will be redirected to this popup/form when they click the Add Message button on the main home page or the edit links on any of the message tabs.

- The priority levels will be None, Critical , Medium , Low

- The user can select multiple recipients via the Recipient list box.

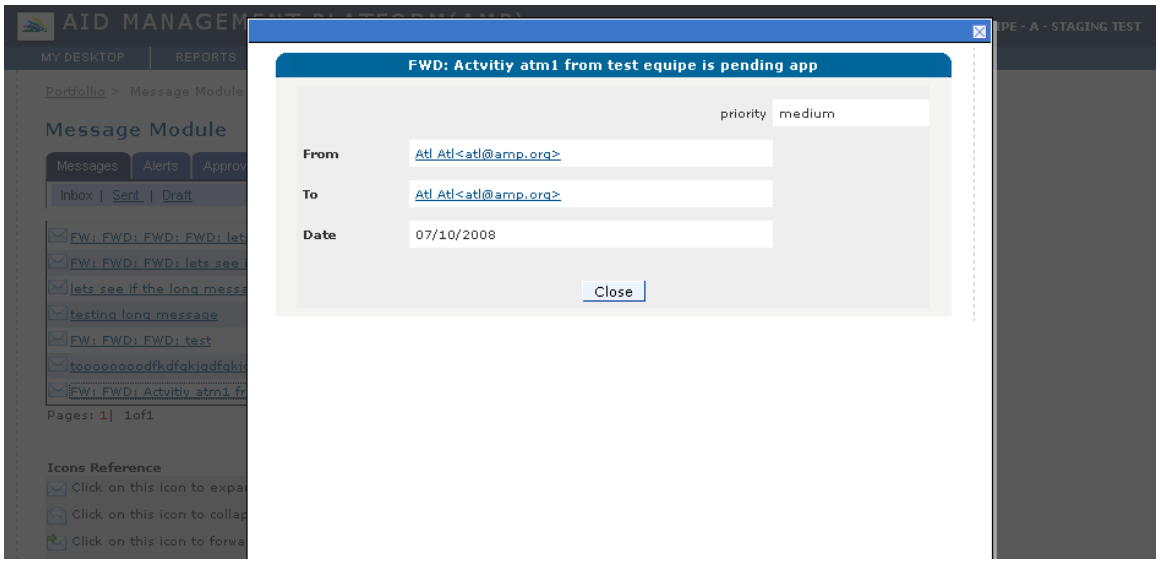
- The message can be set as alert for self or Recipient or both. This will redirect the message to the Alerts tab.

- The user can save the message for future use and can access it from the Saved tab in the messages folder.

- The Select Related Activity box is for messages that would like to reference a particular activity. The drop down would be auto completed giving the closest matches based on

the Typed AMP id. The user can tag the message to an activity. Which means in the view message popup the AMP ID would be a link that can direct the user to the activity.

Message Form Popup



- This popup box will appear when a user clicks on a message or an alert.
- Clicking on the related Activity will redirect the user to the Channel Overview page of the activity

TOOLS

Overview

A useful management tool available in AMP is the Team Workspace. This tool allows Workspace Managers to manage the information and look and feel of the workspace their team operates in while using AMP. Accessing the Team Workspace is done from tools dropdown in the AMP main header menu.

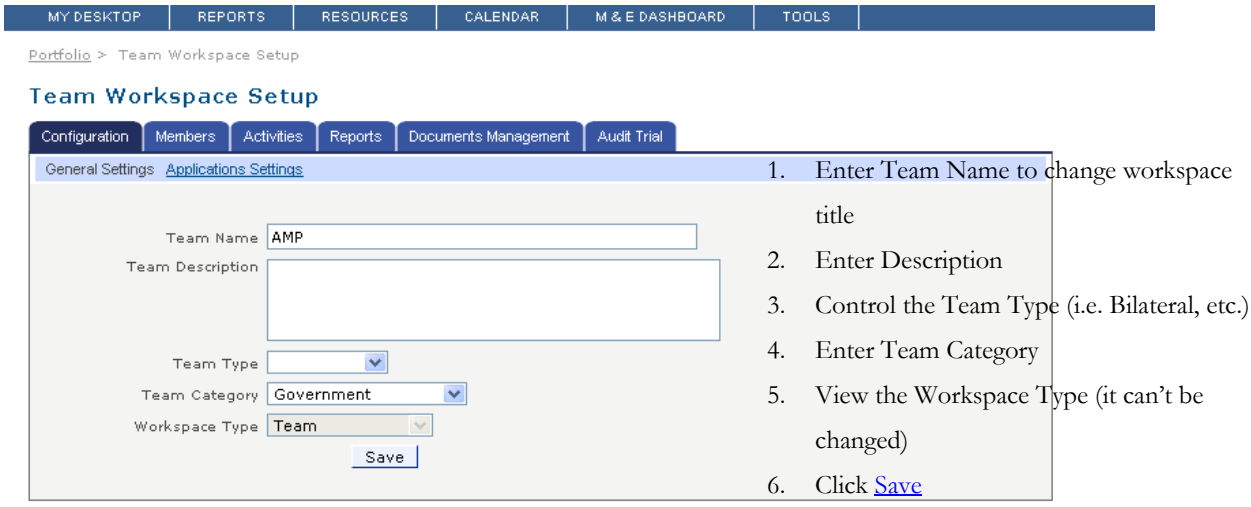
Workspace Info

The Team Workspace is broken into various management sections. These are:

- Configuration
- Members
- Activities
- Reports
- Document Management
- Audit Trail

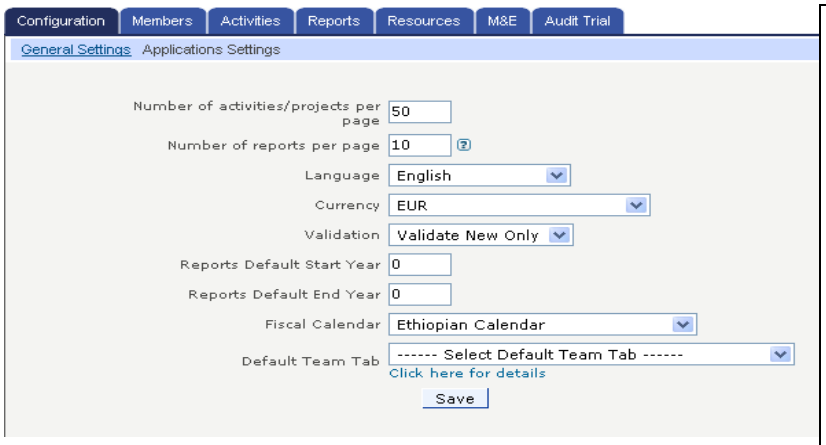
Configuration

Only the Workspace Manager can customize the workspace. The Configuration module allows for several customization options with the Team Workspace.



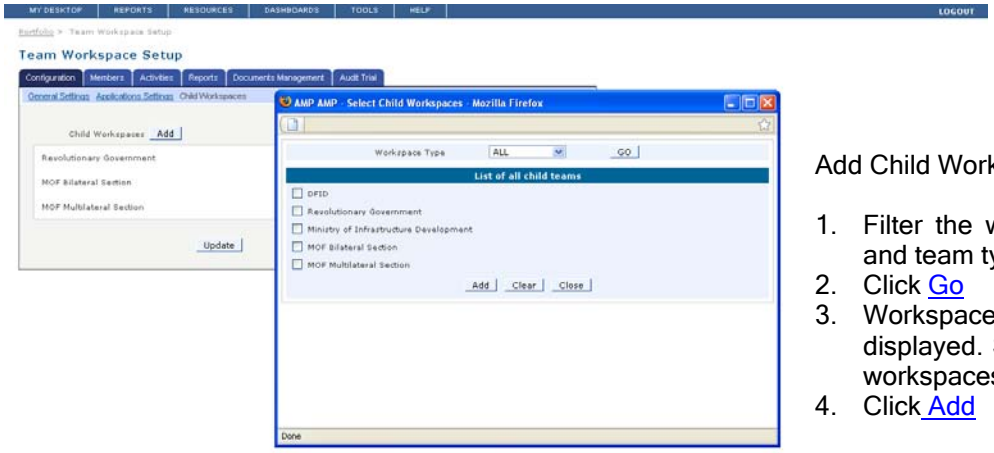
1. Enter Team Name to change workspace title
2. Enter Description
3. Control the Team Type (i.e. Bilateral, etc.)
4. Enter Team Category
5. View the Workspace Type (it can't be changed)
6. Click Save

Application Settings allow you to set various defaults for the team workspace within AMP.



- The Number of records per page affects the number of activities displayed per page. The default is 10.
- Number of reports per page applies to the Report Manager display
- The default Language for AMP
- Currency indicates the amounts' currency used by default. The content of the list is managed on the Admin > Currency Manager.
- Validation allows a Workspace Manager to decide whether they would like to validate all activities in a workspace or only validate new activities within the workspace.
- Reports Default Start Year and End Year control the year range available within reports
- The Fiscal Calendar is the one used by default in the Calendar module and in the filters.
- The Default Team Tab let's the Workspace Manager choose the initial tab

Information Note: Only teams with workspace type of "Management" can have child workspaces Every workspace can be added as a child team to a management team. To add child workspaces to the current one, click on the "Add" button.



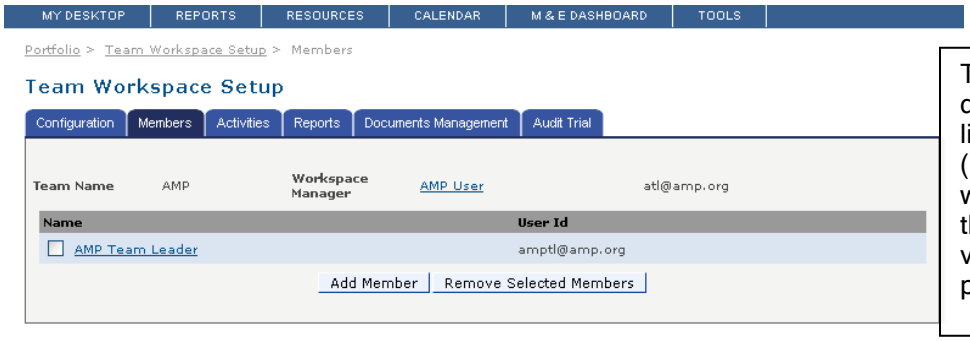
Add Child Workspace:

1. Filter the workspace and team types
2. Click Go
3. Workspaces will be displayed. Select the workspaces
4. Click Add

Members

This list shows all the workspace members, with their names and user id's (which are their email addresses).

1. Add Member



The Workspace Manager is displayed on the top of the list. There can only be one (1) Workspace Manager per workspace. This ensures that a correct activity validation process is in place.

Step 1

- Click Add Member

Step 2

- Enter the user Id (email address entered at the user's creation), the role and set the permissions. Each role has default permissions already set:
    - Workspace Manager: Read, Add/Update and Delete
    - Workspace Member: Read

2. Edit Members Profile

Step 1

- Click member's name – all information will be displayed

Step 2

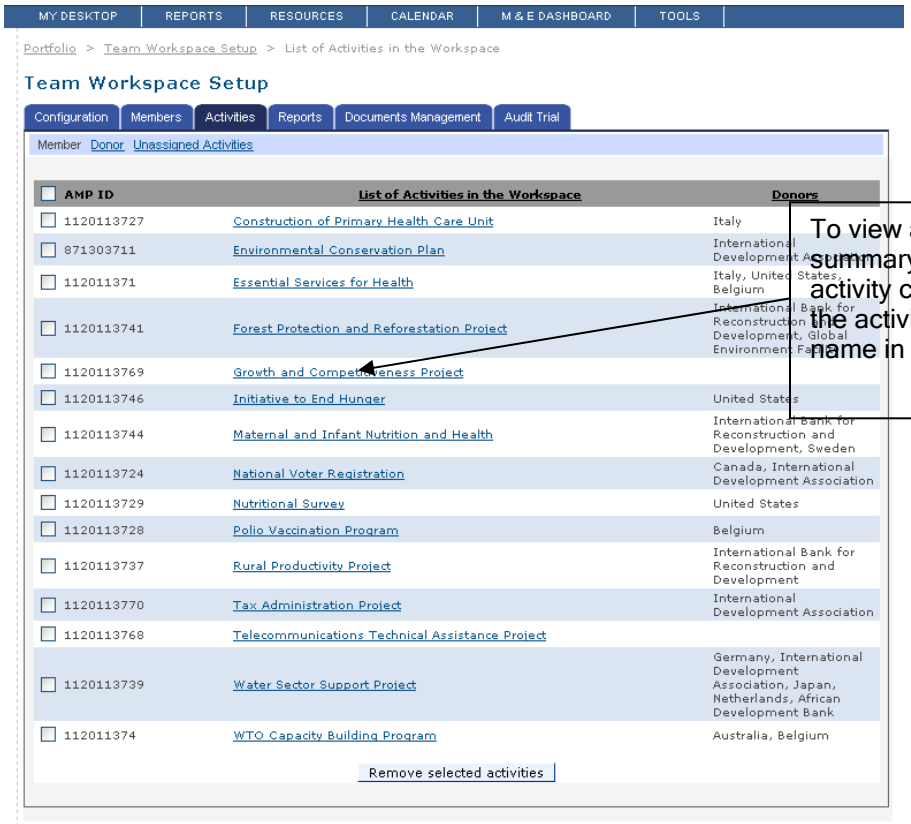
- You can change the member's:
    1. Role: Workspace Manager, Workspace Member.
    2. Permissions: Read, Add/Update, Delete

3. Delete Member

- Check the checkbox corresponding to the member and click Remove selected members

Activity List

This list allows the Workspace Manager to manage all activities appearing in the workspace. The activities are listed with their IDs, names and Donor agencies. The number of records appearing in one page is set in the "Customized Team Settings" tab. The default is ten (10). The following records can be accessed by clicking on the page number links located at the bottom of the screen.


MY DESKTOP
REPORTS
RESOURCES
CALENDAR
M & E DASHBOARD
TOOLS
Portfolio > Team Workspace Setup > List of Activities in the Workspace
Team Workspace Setup
Configuration
Members
Activities
Reports
Documents Management
Audit Trial
Member Donor Unassigned Activities
AMP ID
List of Activities in the Workspace
Donors
1120113727 Construction of Primary Health Care Unit Italy
871303711 Environmental Conservation Plan International Development Association
112011371 Essential Services for Health Italy, United States, Belgium
1120113741 Forest Protection and Reforestation Project International Bank for Reconstruction and Development, Global Environment Fa
1120113769 Growth and Competitiveness Project
1120113746 Initiative to End Hunger United States
1120113744 Maternal and Infant Nutrition and Health International Bank for Reconstruction and Development, Sweden
1120113724 National Voter Registration Canada, International Development Association
1120113729 Nutritional Survey United States
1120113728 Polio Vaccination Program Belgium
1120113737 Rural Productivity Project International Bank for Reconstruction and Development
1120113770 Tax Administration Project International Development Association
1120113768 Telecommunications Technical Assistance Project
1120113739 Water Sector Support Project Germany, International Development Association, Japan, Netherlands, African Development Bank
112011374 WTO Capacity Building Program Australia, Belgium
Remove selected activities

To remove an activity from the workspace, check the checkbox in front of the activity's name and click on the Remove selected activities button. The activity won't be deleted but only removed from the workspace.

To view a summary of an activity click on the activity's name in the list.

1. Add an Existing Activity

Step 1

- Click List of Unassigned Activities – all existing activities that are not part of ANY workspace will be displayed. Only unassigned activities can be added.

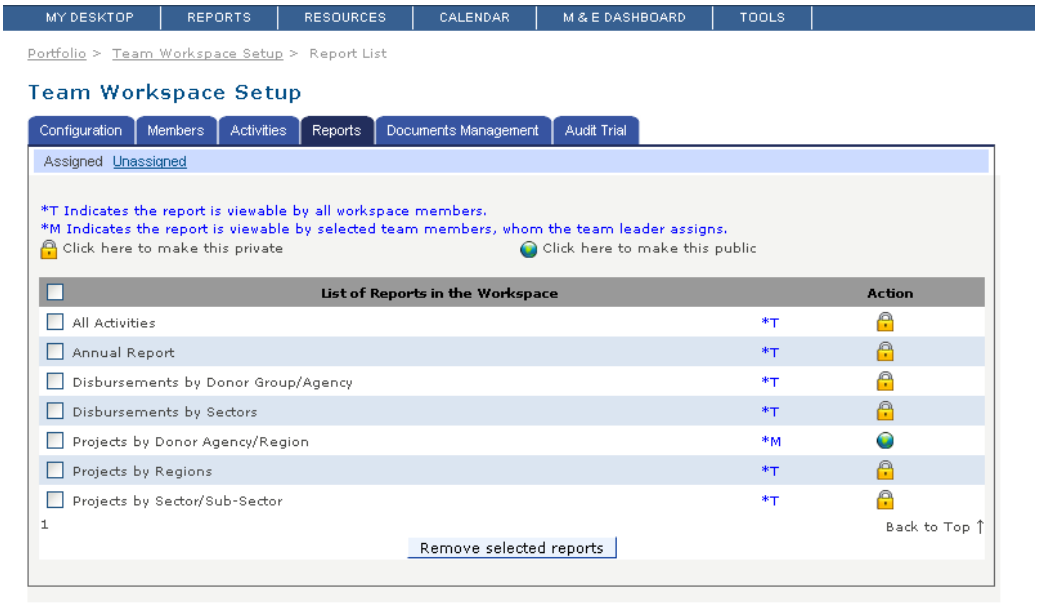
Step 2

- To add one activity, select it with the corresponding checkbox and click Add Activity to Workspace

Report List

This list allows the Workspace Manager to manage all reports appearing in the workspace. The reports are listed with their names. Next to each report, a letter indicates if a report can be viewed by all the Workspace Members (T) or only by selected Workspace Members (M). In either case, a link allows the user to switch from one option to the other: *Make this private* or *Make this Public*.

To remove a report from the workspace, check the checkbox in front of the report's name and click on the "Remove selected reports" button. The report won't be deleted but only removed from the workspace.



1. Add Existing Report

Step 1

- Click List of Unassigned Reports – All existing reports that are not part of any workspace will be displayed.

Step 2

- To add one report, select it with the corresponding checkbox and click on the Add Reports to the Workspace button.

2. Make a private report public

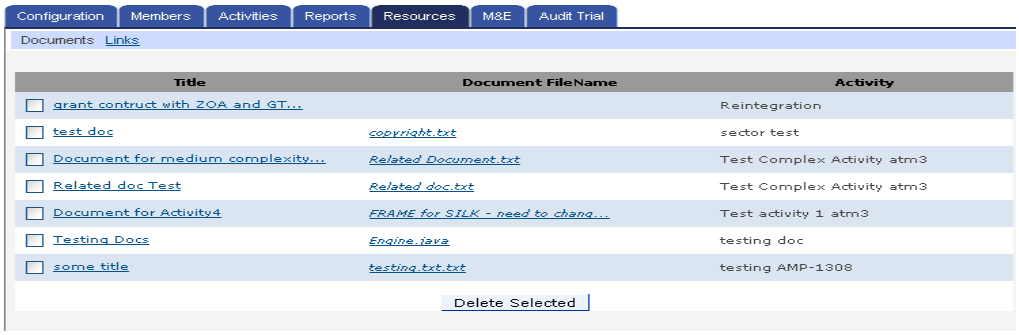
- Click Make this public – link corresponding to that report.

3. Make a public report private

- Click Make this private – link corresponding to that report.

Resources

This list shows all documents and links that have been entered when creating the workspace's activities. For each record, the following information is listed: document/web resource title, link to the resource and activity to which it is attached.

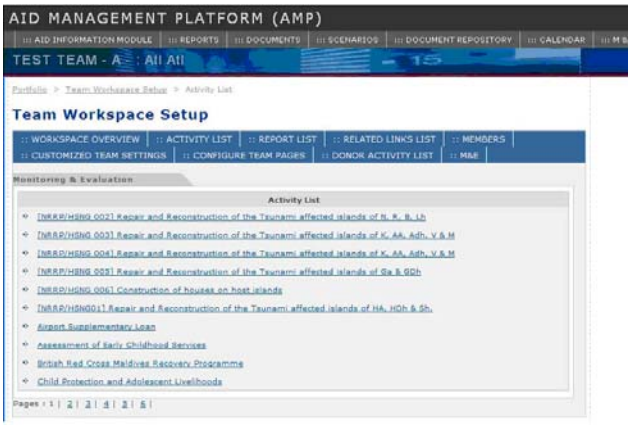


To view the resource's details, click on its name. It displays its name, title, description, type and file name or URL on a new page. Edit and Remove buttons are available.

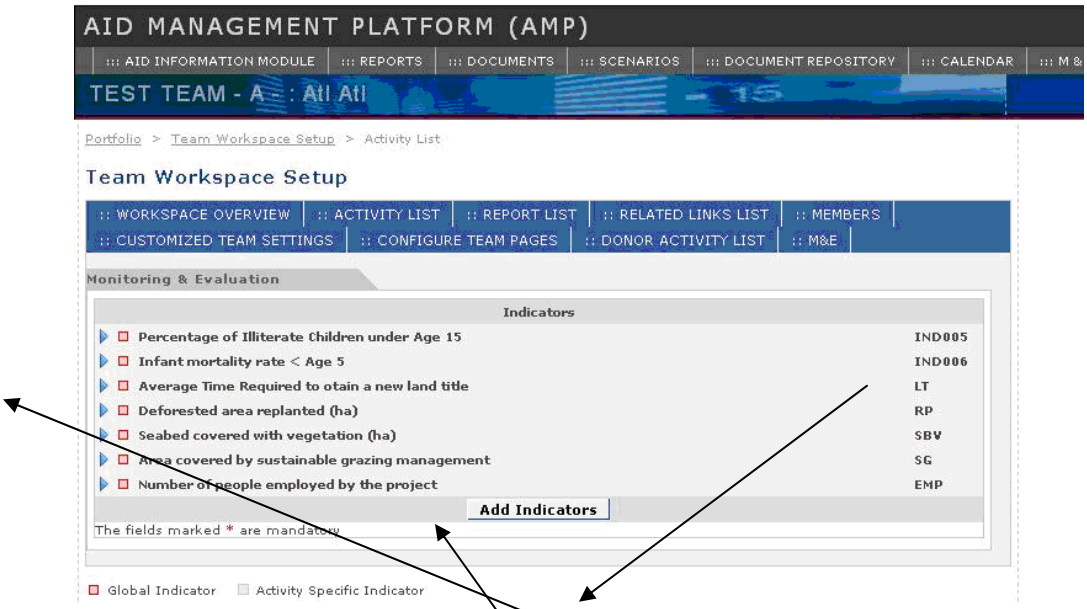
- To edit the resource, view it and click Edit. You can update the title, description and url/file name (by uploading a new file that will replace the old one).
- To delete the resource, view it and click on the Remove button.

M&E (Monitoring & Evaluation)

This page allows the Workspace Manager to manage M&E indicators, by activity. The page lists all the activities that have M&E indicators attached (even if no value has been entered for the indicators in this activity). If global indicators have been created, then all activities are displayed, because global indicators are available to all activities.



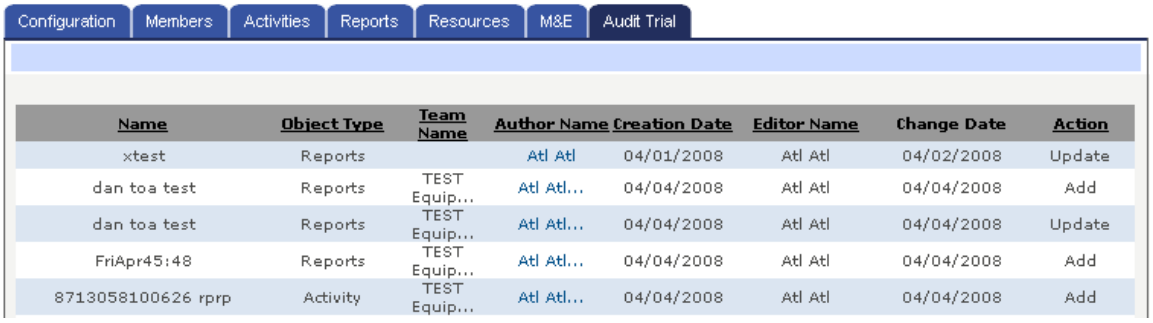
To access an activity's indicators, click on the activity name. It will display all the indicators available for that activity. Global indicators are displayed with a red square in front of their names ■, project specific indicators are displayed with a transparent square: □ .


AID MANAGEMENT PLATFORM (AMP)
::: AID INFORMATION MODULE
::: REPORTS
::: DOCUMENTS
::: SCENARIOS
::: DOCUMENT REPOSITORY
::: CALENDAR
TEST TEAM - A - : Atl Atl
Portfolio > Team Workspace Setup > Activity List
Team Workspace Setup
:: WORKSPACE OVERVIEW
:: ACTIVITY LIST
:: REPORT LIST
:: RELATED LINKS LIST
:: MEMBERS
:: CUSTOMIZED TEAM SETTINGS
:: CONFIGURE TEAM PAGES
:: DONOR ACTIVITY LIST
:: M&E
Monitoring & Evaluation
Indicators
Percentage of Illiterate Children under Age 15 IND005
Infant mortality rate < Age 5 IND006
Average Time Required to otain a new land title LT
Deforested area replanted (ha) RP
Seabed covered with vegetation (ha) SBV
Area covered by sustainable grazing management SG
Number of people employed by the project EMP
Add Indicators
The fields marked * are mandatory
Global Indicator
Activity Specific Indicator

- To edit the value of an indicator. Click on the ▶ icon in front of its name and make any desired change on the indicator's values.
- To add an indicator, click on the Add Indicators button. This is used for activity/project specific indicators, as global indicators are already assigned to all activities.

Audit Trail

The Audit Trail allows a Workspace Manager to monitor the add, edit and delete activities of each member of the workspace .



Name	Object Type	Team Name	Author Name	Creation Date	Editor Name	Change Date	Action
xtest	Reports		Atl Atl	04/01/2008	Atl Atl	04/02/2008	Update
dan toa test	Reports	TEST Equip...	Atl Atl...	04/04/2008	Atl Atl	04/04/2008	Add
dan toa test	Reports	TEST Equip...	Atl Atl...	04/04/2008	Atl Atl	04/04/2008	Update
FriApr45:48	Reports	TEST Equip...	Atl Atl...	04/04/2008	Atl Atl	04/04/2008	Add
8713058100626 rprp	Activity	TEST Equip...	Atl Atl...	04/04/2008	Atl Atl	04/04/2008	Add

LANGUAGE

The Language link brings up a sub menu containing the various language versions of AMP available for your use. TO change the language, simply click on the language of your choice and the software will then be available in that language.

Information Note: Data that you have directly inputted will not be converted to the language chosen. You must enter data in the language you desire to enter it in.

PUBLIC VIEW

Overview

When opening the AMP homepage, there is the possibility of using it as a public user, by accessing the Public Portfolio. In this case, there is no need for a username and password. Three modules are available to the public:

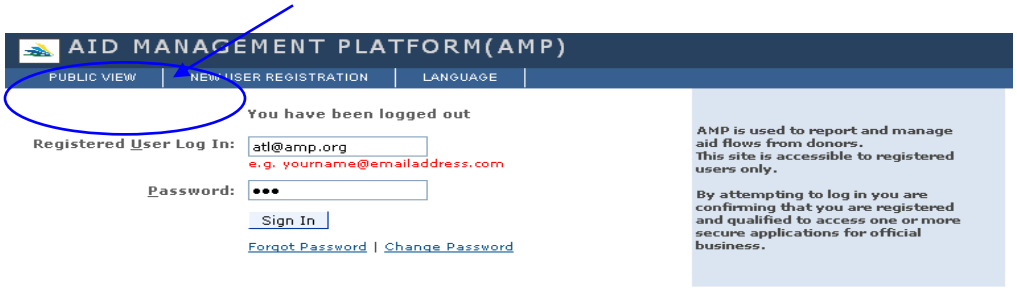
1. Aid Information Module
2. Reports
3. Public Documents

Clicking the shortcut link – Go to Login Page – allows an authorized user to log into AMP. The public user can change the AMP language by selecting another language from the language drop down list.

1. Access Public View

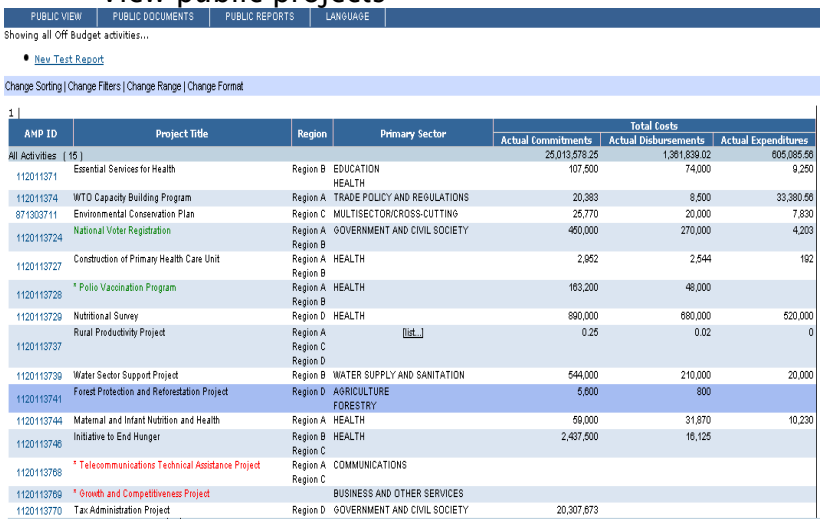
Step 1

- Click Public View


AID MANAGEMENT PLATFORM(AMP)
PUBLIC VIEW
NEW USER REGISTRATION
LANGUAGE
You have been logged out
Registered User Log In:
atl@amp.org
e.g. yourname@emailaddress.com
Password:
Sign In
Forgot Password | Change Password
AMP is used to report and manage aid flows from donors.
This site is accessible to registered users only.
By attempting to log in you are confirming that you are registered and qualified to access one or more secure applications for official business.

Step 2

- View public projects


PUBLIC VIEW
PUBLIC DOCUMENTS
PUBLIC REPORTS
LANGUAGE
Showing all Off Budget activities...
New Test Report
Change Sorting | Change Filters | Change Range | Change Format
AMP ID
Project Title
Region
Primary Sector
Total Costs
Actual Commitments
Actual Disbursements
Actual Expenditures
All Activities (15)
25,013,578.25
1,361,839.02
605,085.56
112011371 Essential Services for Health Region B EDUCATION HEALTH 107,500 74,000 9,250
112011374 WTO Capacity Building Program Region A TRADE POLICY AND REGULATIONS 20,383 8,500 33,380.56
871303711 Environmental Conservation Plan Region C MULTISECTOR/CROSS-CUTTING 25,770 20,000 7,830
1120113724 National Voter Registration Region A Region B GOVERNMENT AND CIVIL SOCIETY 460,000 270,000 4,203
1120113727 Construction of Primary Health Care Unit Region A Region B HEALTH 2,952 2,544 192
1120113728 * Polio Vaccination Program Region A Region B HEALTH 163,200 48,000
1120113729 Nutritional Survey Region D HEALTH 890,000 680,000 520,000
1120113737 Rural Productivity Project Region A Region C Region D [list...] 0.25 0.02 0
1120113739 Water Sector Support Project Region B WATER SUPPLY AND SANITATION 544,000 210,000 20,000
1120113741 Forest Protection and Reforestation Project Region D AGRICULTURE FORESTRY 5,600 800
1120113744 Maternal and Infant Nutrition and Health Region A HEALTH 59,000 31,870 10,230
1120113746 Initiative to End Hunger Region B Region C HEALTH 2,437,500 16,125
1120113768 * Telecommunications Technical Assistance Project Region A Region C COMMUNICATIONS
1120113769 * Growth and Competitiveness Project BUSINESS AND OTHER SERVICES
1120113770 Tax Administration Project Region D GOVERNMENT AND CIVIL SOCIETY 20,307,573

This selection of projects to be displayed is done at the Admin level, in the "Global Settings" feature of the Admin menu. The admin chooses to enable or disable the public access (by displaying the "View Public Portfolio" button). When Public access is enabled, the admin has to select which types of activities will be displayed in the public view:

1. Off budget (default value)
2. On budget
3. All activities

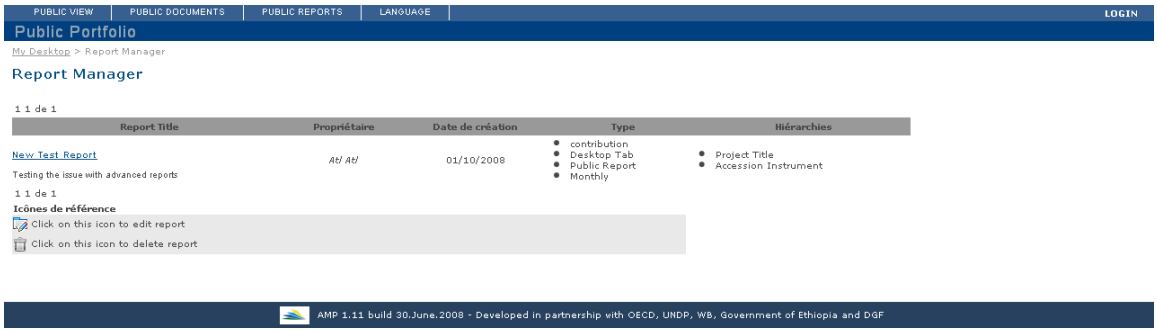
Whatever the selection is, it is displayed on the top of the page.

2. Access Public Reports

On the Desktop Homepage, preset tabs allow the sorting of activities. Those tabs are set by an authorized Workspace Member. This user will log into AMP to create a report that will be defined as a "Public Report (see **Reporting** section of user manual for more information). Public Reports are tabs appearing on the Public view Desktop.

Step 1

- Click "Reports" tab on the menu bar



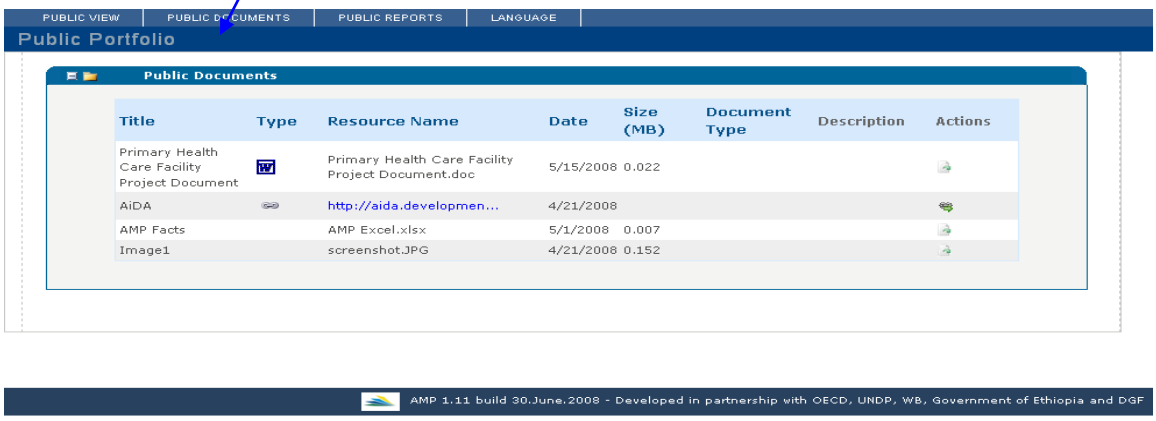
Step 2

- View public reports (Reports homepage displays all existing public reports)

3. Access Public Documents

Step 1

- Click "Public Documents" tab



Step 2

- View public documents – you can sort the documents by File name, Resource title, Date, and Content type, and also download these files to view them.

Appendix A – Glossary of Key Terms

Accession Instrument	IPA or CARDS
A.C. Chapter	Chapters 1 – 35
Activity Budget	
• Activity is On Budget	Activity is captured in the budget
• FY	Fiscal Year
• Vote	
• Sub-Vote	
• Sub-Program	
• Project Code	Project code for the activity
Actual Approval Date	Actual project approval date
Actual Start Date	Actual project start date
Add File	Add a new file to the Document Manager
Add Version	Add a new version of an existing document
Assumption	Assumptions related to the above indicators
Content Type	Type of document (i.e. application/msword)
Cross Cutting Issues	EU Consensus on Development objectives for strengthening the impact and sustainability of cooperation
Equal Opportunity	Actions this activity takes towards promotion of equal opportunities for all
Environment	Actions this activity takes towards maintaining a sustainable environment
Minorities	Actions this activity takes towards supporting the rights of minorities
Current Completion Date	Project completion date at this point in time
Delete	Delete a document from the document manager

Description	Description of the Activity
Document Date	Date the Document was added or revised
Document Description	Description of the document
Download	Download a file from the Document Manager
File Name	Name of the file
Final Date for Contracting	Final date for project contracting
Final Date for Disbursements	Final date for disbursements related to the project
Financial Instrument	Financial instrument that will be used for the project – choices allowed are (GBS, SBS, Basket or DPS on Budget)
Government Approval Procedures	Additional procedures or approvals required
Implementation Level	Level of implementation – choose from dropdown selection (National, Regional, Both)
Implementation Location	Select the appropriate region, zone or other selection as needed
"Planned" or "Actual"	Status of the funding item
Amount	Enter the amount in thousands
Currency	Type of currency that will be used
Planned/Actual	Date associated with the respective commitment, disbursement or expenditure

Joint Criteria

Lessons Learned	Enter lessons learned in the form of notes
Line Ministry Rank	Priority rank for the Link of Ministry
Ministry of Planning Rank	Priority rank for the Ministry of Planning
MTEF Projection	Medium Term Expenditure Framework; annual three-year planning and budget formulation process for allocating public resources

Projected/Pipeline

Amount	Enter the amount in thousands
Currency	Type of currency that will be used
Projection Date	Date associated with respective projection
Exchange Rate	Enter the exchange rate
Objective	Objective of the Activity
Objectively Verifiable Indicators	Standard indicators that can be verified through quantitative means
Organization Type	
Active/Inactive	
Delegated Cooperation	
Delegated Partner	
Project Title	Title of your Activity
Proposed Approval Date	Proposed project approval date
Proposed Completion Date	Proposed project completion date
Proposed Start Date	Proposed project start date
Publish	Allow the document to be available for public view
Purpose	Purpose of the Activity
Republish	After uploading a new version, allow the new version to be available for public view
Resource Title	Title of the File
Results	Results of the Activity
Status *	Project status (choose from dropdown) – any additional notes and/or changes about that project status can be noted in the text box. The various status types will vary depending on your country requirements and definitions. A definition of each status can be displayed by clicking the button next to "Status".

Unpublish	Restrict a Published document from being available for public view
Verification	TBD
Version History	View the upload history of a document

Appendix B – Icon Reference

>> Go To last page

> Go to next page

Appendix C – Donor Reports

Sample Donor Reports and the formulas for measure calculations

Simple report (No Hierarchy)

When creating a report with no hierarchy the user can select any of the columns that have been turned on in the Feature Manager for that AMP. There are no limits on the number of columns in a report. However the user must be aware that selecting too many columns results is often a very long report making it difficult to read and analyze data. As this is a regular report with no grouping (hierarchy) of any kind the measures will be calculated as follows:

Measure	Formula
Total Planned Commitments per activity	Sum of all the planned commitments in the funding org page for an activity
Total Planned Disbursements per activity	Sum of all planned disbursements in the donor funding section for an activity
Total Actual Commitments per activity	Sum of all Actual Commitments in the donor funding section for an activity
Total Actual Disbursements per activity	Sum of all Actual Disbursements in the donor funding section for an activity
Undisbursed Balance per activity	Total Actual Commitments per activity – Total Actual Disbursements per activity
Total Commitments (For Bolivia only)	Total Actual Commitments + Total Planned Commitments

This is how the report will appear in AMP

Project Title	Region	Sector	Funding				
			Actual disbursements	Planned Disbursements	Actual Commitments	Planned Commitments	Undisbursebed Balance

Report Totals			9000	19000	19000	14000	10000
Education Project	Est. Nord	Education Agriculture	4000	12000	9000	5000	5000
Water project	Est Nord	Education Agriculture	5000	7000	10000	9000	5000

2000 + 3000 = 5000

Activity Details

Field Name	Value		Value	
Activity name	Education Project		Water project	
Sector	Education	Agriculture	Education	Agriculture
Region	Est.	Nord	Est.	Nord
Donor Funding				
Planned Commitments	3000	2000	4000	5000
Actual Commitments	4000	5000	5000	5000
Planned Disbursements	6000	6000	3000	4000
Actual Disbursements	2000	2000	2000	3000

Hierarchy reports mean that activities are grouped by certain conditions (for e.g. All the Activities funded by one donor agency will be grouped under the same donor agency). Let's take examples of some basic reports. All the examples listed below have hierarchies with fields on the activity that are assigned some percentage of the funding.

1 level hierarchy – sector as a hierarchy

The report will split the activity totals per sector based on the percentage.
This how the totals per activity per sector should be calculated

Measure	Formula
Total Planned Commitments per activity per sector	(Sum of all planned commitments for that activity in the funding organization page) * Sector Percentage/100.
Total Actual Commitments per activity per sector	(Sum of all Actual commitments for that activity in the funding organization page) * Sector Percentage/100.
Total Actual Disbursements per activity per sector	(Sum of all Actual disbursements for that activity in the funding organization page) * Sector Percentage/100
Total Planned Disbursements per activity per sector	(Sum of all Planned Disbursements for that activity in the funding organization page) * Sector Percentage/100
Undisbursed Balance per activity per sector	(Total Actual Commitments per activity per Sector) – Total Actual Disbursements per activity per

	Sector)
Total Commitments per activity per sector (For Bolivia only)	Total Actual Commitments + Total Planned Commitments per activity per sector

Given below is an example of how the report will break down the amounts per sector for that activity

Project Title	Funding				
	Actual disbursements	Planned Disbursements	Actual Commitments	Planned Commitments	Undisbursebed Balance
Report Totals	9000	19000	19000	14000	10000
Education					
Education Project	2000	6000	4500	2500	2500
Water project	1250	1750	2500	2250	1250
Total for Education	3250	7750	7000	4750	3750
Agriculture					
Education Project	2000	6000	4500	2500	2500
Water project	3750	5250	7500	6750	3750
Totals for Agriculture	5750	11250	12000	9250	6250

(Sum of all Actual Commitments for the activity * (sector percentage /100)) = (5000 + 5000) * 75/100

Activity Details

Field Name	Value		Value	
Activity name	Education Project		Water project	
Sector	Education	Agriculture	Education	Agriculture
Percentage	50	50	25	75
Donor Funding				
Planned Commitments	3000	2000	4000	5000
Actual Commitments	4000	5000	5000	5000
Planned Disbursements	6000	6000	3000	4000
Actual Disbursements	2000	2000	2000	3000

Similar calculations will apply to other fields on the activity that are split by a percentage. For the Donor Reports these are:

- Region
- National Programming Objective
- Primary Program
- Secondary Program
- Executing agency (For Bolivia implementation only)
- Componente (For Bolivia Implementation only)

Fields that are not split by a percentage are:

- A.C. Chapter
- Implementation Level
- Accession Instrument
- Executing Agency
- Donor
- Donor Group
- Donor Agency
- Status
- Type Of Assistance
- Financing Instrument
- On/Off Budget
- Donor Type
- Credit/Donation
- Beneficiary Agency
- Implementing Agency
- Responsible Organization
- Activity Created By
- Project Category

2 level hierarchy - sector grouped by regions

This report will group sectors by regions. The percentage will at applied at both the levels. This is how totals per activity per sector per region should be calculated.

Measure	Formula
Total Planned Commitments per activity per sector per region	((Sum of all planned commitments for that activity in the funding organization page) * Sector Percentage/100) * Region percentage /100.
Total Actual Commitments per activity per sector per region	((Sum of all Actual commitments for that activity in the funding organization page) * Sector Percentage/100) * Region Percentage/100.
Total Actual Disbursements per activity per sector per region	((Sum of all Actual disbursements for that activity in the funding organization page) * Sector Percentage/100) * Region Percentage/100.
Total Planned Disbursements per activity per sector per region	((Sum of all Planned Disbursements for that activity in the funding organization page) * Sector Percentage/100) * Region Percentage/100.
Undisbursed Balance per activity per sector per region	((Total Actual Commitments per activity per Sector) - Total Actual Disbursements per activity per Sector)) * Region Percentage/100.
Total Commitments per activity per sector per region (For Bolivia only)	(Total Actual Commitments + Total Planned Commitments per activity) per sector per region

Given below is an example of two activities and a sample of how the report will break down the amounts per sector per region for these activities activity

Project Title	Funding				
	Actual disbursements	Planned Disbursements	Actual Commitments	Planned Commitments	Undisbursed Balance
Report Totals	9000	19000	19000	14000	10000
Region:Nord					
Sector: Education					
Education Project	600	1800	1350	750	750
Water project	250	350	500	450	250
Totals for Education	850	2150	1850	1200	1000
Sector: Agriculture					
Education Project	600	1800	1350	750	750
Water project	750	1050	1500	1350	750
Totals for Agriculture	1350	2850	2850	2100	1500
Totals for Nord	2200	5000	4700	3300	2500
Region :Est					
Sector: Education					
Education Project	1400	4200	3150	1750	1750
Water project	1000	1400	2000	1800	1000
Total for Education	2400	5600	5150	3550	2750
Sector: Agriculture					
Education Project	1400	4200	3150	1750	1750
Water project	3000	4200	6000	5400	3000
Total for Agriculture	4400	8400	9150	7150	4750
Total for Est		14000	14300	10700	7500

For e.g. Total Planned Disbursements of the Education Project grouped by the Agriculture grouped bye grouped under the Est. Region
((6000 + 6000) *50/100) * 70/100 = 4200

ity Details

			Value	
Activity name	Education Project		Water project	
Sector	Education	Agriculture	Education	Agriculture
Sector Percentage	50	50	25	75
Region	Nord	Est	Nord	Est
Region	30	70	20	80
Donor Funding				
Planned Commitments	3000	2000	4000	5000
Actual Commitments	4000	5000	5000	5000
Planned Disbursements	6000	6000	3000	4000
Actual Disbursements	2000	2000	2000	3000

3 level hierarchy – sector grouped by regions grouped by National Planning Objectives

This report will group by sectors by regions and by the National Planning objective. The percentage will at applied at all the three levels. This is how totals per activity per sector per region and per NPO should be calculated.

Measure	Formula
Total Planned Commitments per activity per sector per region per NPO	(((Sum of all planned commitments for that activity in the funding organization page) * Sector Percentage/100) * Region percentage /100) * NPO Percentage/100).
Total Actual Commitments per activity per sector per region per NPO	(((Sum of all Actual commitments for that activity in the funding organization page) * Sector Percentage/100) * Region Percentage/100)* NPO Percentage/100).
Total Actual Disbursements per activity per sector per region per NPO	(((Sum of all Actual disbursements for that activity in the funding organization page) * Sector Percentage/100) * Region Percentage/100)* NPO Percentage/100). .
Total Planned Disbursements per activity per sector per region per NPO	(((Sum of all Planned Disbursements for that activity in the funding organization page) * Sector Percentage/100) * Region Percentage/100) * NPO Percentage/100). .
Undisbursed Balance per activity per sector per region per NPO	(((Total Actual Commitments per activity per Sector) – Total Actual Disbursements per activity per Sector)) * Region Percentage/100) * NPO Percentage/100).
Total Commitments per activity per sector per region (For Bolivia only) per NPO	((Total Actual Commitments + Total Planned Commitments per activity) per sector per region per NPO

Next is an example of two activities and a sample of how the report will break down the amounts per sector per region per National Program for these activities activity

Project Title	Funding			
	Actual disbursements	Planned Disbursements	Actual Commitments	Planned Commitments
Report Totals	9000	19000	19000	14000
NPO: Literacy				
Region: Nord				
Sector: Education				
Education Project	120	360	270	150
Water project	125	175	250	225
Totals for Education 375	245	535	520	
Sector: Agriculture				
Education Project	120	360	270	150
Water project	375	525	750	675
Totals for Agriculture 825	495	885	1020	
Totals for Nord 1200	740	1420	1540	
Region :Est				
Sector: Education				
Education Project	280	840	630	350
Water project	500	700	1000	900
Total for Education 1250	780	1540	1630	
Sector: Agriculture				
Education Project	280	840	630	350
Water project	1500	2100	3000	2700
Total for Agriculture 3050	1780	2940	3630	
Total for Est 4300	2560	4480	5260	
Totals For Literacy 5500	3300	5900	6800	
NPO: Health				
Region: Nord				
Sector: Education				
Education Project	480	1440	1080	600
Water project	125	175	250	225
Totals for Education 825	605	1615	1330	
Sector: Agriculture				
Education Project	480	1440	1080	600
Water project	375	525	750	675
Totals for Agriculture 1275	855	1965	1830	
Totals for Nord 2100	1460	3580	3160	
Region :Est				
Sector: Education				
Education Project	1120	3360	2520	700
Water project	500	700	1000	900

Total for Education 1600	1620	4060	3520		
Sector: Agriculture					
Education Project	1120	3360	2520	70	
Water project	1500	2100	3000		2700
Total for Agriculture 3400	2620	5460			
Total for Est 7100	4240	9520			
Totals For Heatlh 8900	5700	13100			

For e.g. Total Planned Disbursements of the Education Project grouped by the Literacy grouped by Nord grouped under Education (((3000+2000))* 80/100)*30/100)*50/100) = 600

Activity Details

Field Name	Value		Value	
Activity name	Education Project		Water project	
Sector	Education	Agriculture	Education	Agriculture
Sector Percentage	50	50	25	75
Region	Nord	Est	Nord	Est
Region	30	70	20	80
NPO	Literacy	Health	Lieracy	Health
NPO Percentage	20	80	50	50
Donor Funding				
Planned Commitments	3000	2000	4000	5000
Actual Commitments	4000	5000	5000	5000
Planned Disbursements	6000	6000	3000	4000
Actual Disbursements	2000	2000	2000	3000

Appendix D – Regional Reports

Simple regional report with no hierarchy

When creating a report with no hierarchy the user can select any of the columns that have been turned on in the Feature Manager for that AMP. As this is a regular regional report with no grouping (hierarchy) of any kind the measures will be calculated as follows:

Measure	Formula
Total Planned Commitments per activity	Sum of all the planned commitments in the regional funding org page for an activity
Total Planned Disbursements per activity	Sum of all planned disbursements in the regional funding section for an activity
Total Actual Commitments per activity	Sum of all Actual Commitments in the regional funding section for an activity
Total Actual Disbursements per activity	Sum of all Actual Disbursements in the regional funding section for an activity
Undisbursed Balance per activity	Total Actual Commitments per activity – Total Actual Disbursements per activity
Total Commitments (For Bolivia only)	Total Actual Commitments + Total Planned Commitments

This is how the report will appear in AMP

Project Title	Region	Sector	Funding				
			Actual disbursements	Planned Disbursements	Actual Commitments	Planned Commitments	Undisbursebed Balance
Report Totals			9000	19000	19000	14000	10000
Education Project	Est. Nord	Education Agriculture	4000	12000	9000	5000	5000
Water project	Est Nord	Education Agriculture	5000	7000	10000	9000	5000

2000 + 3000 = 5000

Activity Details

Field Name	Value		Value	
Activity name	Education Project		Water project	
Sector	Education	Agriculture	Education	Agriculture
Region	Est.	Nord	Est.	Nord
Regional Funding				
Planned Commitments	3000	2000	4000	5000
Actual Commitments	4000	5000	5000	5000
Planned Disbursements	6000	6000	3000	4000
Actual Disbursements	2000	2000	2000	3000

Report with 1 hierarchy

As the funding in regional reports is split by the regions it is always a good practice to create a hierarchy report with region. The activities that do not have a region allocated will fall under "unallocated" section in a regional report with region hierarchy. These activities will not display amounts as there is no regional funding entered for these activities. This is because some activities may not have regional funding data entered. Let's look at an example of a regional report with Region as a hierarchy.

In the case of regional reports the funding amounts are not split by region percentage. This is a common misconception. When creating an activity and assigning regional funding the user must select a region and assign funding to that region. The regions are selected on the location step of the activity form. When creating regional reports if one selects region as a hierarchy one can see the exact funding by region. With no region as a hierarchy it is difficult to analyze how much of the funding is dedicated to each region. Also when selecting region as a hierarchy it is best to select region as the top most hierarchy to get a complete picture of the funding by region.

1 level hierarchy – region as a hierarchy

The report will split the funding based on the amounts entered under regional funding. Here are the formulas for the regional funding amounts:

Measure	Formula
Total Planned Commitments per activity per region	(Sum of all planned commitments for that activity in the regional funding page per region)
Total Actual Commitments per activity per region	(Sum of all Actual commitments for that activity in the regional funding page per region)
Total Actual Disbursements per activity per region	(Sum of all Actual disbursements for that activity in the regional funding page per region)
Total Planned Disbursements per activity per region	(Sum of all Planned Disbursements for that activity in the regional funding page per region)
Undisbursed Balance per activity per region	(Total Actual Commitments per activity per region) – Total Actual Disbursements per activity per region)
Total Commitments per activity per region(For Bolivia only)	Total Actual Commitments + Total Planned Commitments per activity per sector

Given below is an example of how the report will break down the amounts per region for that activity

Project Title	Funding				
	Actual disbursements	Planned Disbursements	Actual Commitments	Planned Commitments	Undisbursebed Balance
Report Totals	9000	19000	19000	14000	10000
Est					
Education Project	2000	6000	4000	3000	2000
Water project	2000	3000	5000	4000	3000
Total for Est	4000	9000	9000	7000	5000
Nord					
Education Project	2000	6000	5000	2000	3000
Water project	3000	4000	5000	5000	2000
Totals for Nord	5000	10000	10000	7000	5000

(Sum of all Actual Commitments for the activity assigned to the Nord Region

Activity Details

Field Name	Value		Value	
Activity name	Education Project		Water project	
Sector	Education	Agriculture	Education	Agriculture
Region	Est.	Nord	Est.	Nord
Regional Funding				
Planned Commitments	3000	2000	4000	5000
Actual Commitments	4000	5000	5000	5000
Planned Disbursements	6000	6000	3000	4000
Actual Disbursements	2000	2000	2000	3000

2 level hierarchy – region and sector as hierarchy

As the sector is not tied to a particular region the regional amounts will be split by sector for every region.

Measure	Formula
Total Planned Commitments per activity per sector per region	(Sum of all planned commitments for that activity in the regional funding page per region) * sector percentage/100
Total Actual Commitments per activity per sector per region	(Sum of all Actual commitments for that activity in the regional funding page per region) * sector percentage/100
Total Actual Disbursements per activity per sector per region	(Sum of all Actual disbursements for that activity in the regional funding page per region) * sector percentage/100
Total Planned Disbursements per activity per sector per region	(Sum of all Planned Disbursements for that activity in the regional funding page per region) * sector percentage/100
Undisbursed Balance per activity per sector per region	(Total Actual Commitments per activity per region) – Total Actual Disbursements per activity per region) * sector percentage/100

Given below is an example of how the report will break down the amounts per sector for every region for that activity. Given below are examples of two activities and a sample of how the report will break down the amounts per sector per region for these activities activity

Project Title	Funding				
	Actual disbursements	Planned Disbursements	Actual Commitments	Planned Commitments	Undisbursed Balance
Report Totals	9000	19000	19000	14000	10000
Region:Nord					
Sector: Education					
Education Project	1000	3000	2000	1500	1000
Water project	500	750	1250	1000	750
Totals for Education	1500	3750	3250	2500	1750
Sector: Agriculture					
Education Project	1000	3000	2000	1500	1000
Water project	1500	2250	3750	3000	2250

Totals for Agriculture 3250	2500	5250	5750	4500	
Totals for Nord 5000	4000	9000	9000	7000	
Region :Est					
Sector: Education					
Education Project	1000	3000	2500	1000	1500
Water project	750	3000	1250	1250	500
Total for Education 2000	1750	6000	3750	2250	
Sector: Agriculture					
Education Project	1000	3000	2500	1000	1500
Water project	2250	1[illegible]0	3750	3750	1500
Total for Agriculture 3000	325[illegible]	4000	6250	4750	
Total for Est 5000		10000	10000	7000	

(Sum of all Planned Disbursements for the activity assigned to the Nord Region * Sector Percentage/100 = 6000 * 50/100 = 3000

Activity Details

Field Name	Value		Value	
Activity name	**Education Project**		**Water project**	
Sector	**Education**	**Agriculture**	**Education**	**Agriculture**
Sector Percentage	**50**	**50**	**25**	**75**
Region	**Nord**	**Est**	**Nord**	**Est**
Region Percentage	**50**	**50**	**75**	**25**
Donor Funding				
Planned Commitments	**3000**	**2000**	**4000**	**5000**
Actual Commitments	**4000**	**5000**	**5000**	**5000**
Planned Disbursements	**6000**	**6000**	**3000**	**4000**
Actual Disbursements	**2000**	**2000**	**2000**	**3000**

3 level hierarchy – region and sector and National Program as hierarchy

As the sector and the national program is not tied to a particular region the regional amounts will be split by sector for every region.

Measure	Formula
Total Planned Commitments per activity per region per sector per national program	((Sum of all planned commitments for that activity in the regional funding page per region) * sector percentage/100) * National Program percentage/100)
Total Actual Commitments per activity per region per sector per national program	((Sum of all Actual commitments for that activity in the regional funding page per region) sector percentage/100) * National Program percentage/100)
Total Actual Disbursements per activity per region per sector per national program	((Sum of all Actual disbursements for that activity in the regional funding page per region) sector percentage/100) * National Program percentage/100)
Total Planned Disbursements per activity per region per sector per national program	((Sum of all Planned Disbursements for that activity in the regional funding page per region) sector percentage/100) * National Program percentage/100)
Undisbursed Balance per activity per region per sector per national program per national program	((Total Actual Commitments per activity per region) – Total Actual Disbursements per activity per region) sector percentage/100) * National Program percentage/100)

Given below is an example of how the report will break down the amounts per sector for every region for that activity

	Actual disbursements	Planned Disbursements	Actual Commitments	Planned Commitments
Report Totals	9000	19000	19000	14000
Region: Nord				
NPO: Literacy				
Sector: Education				
Education Project	200	600	400	300
Water project	375	375	625	500
Totals for Education	575	975	1025	800
Sector: Agriculture				
Education Project	200	600	400	300
Water project	1125	1125	1875	1500
Totals for Agriculture	1325	1725	2275	1800
Totals for Literacy	1900	2700	3300	2600
NPO: Health				
Sector: Education				
Education Project	800	2400	1600	1200
Water project	250	375	625	500
Totals for Education	1050	2775	2225	1700

Sector: Agriculture				
Education Project	800	2400	1600	1200
Water project	250	1125	1875	1500
Totals for Agriculture	1050	3525	3475	2700
Totals for Heatlh	2100	6300	5700	4400
Totals for Nord 7000	4000	9000	9000	
Region: Est				
NPO: Literacy				
Sector: Education				
Education Project	200	600	500	200
Water project	375	500	625	625
Totals for Education 825	575	1100	1125	
Sector: Agriculture				
Education Project	200	600	500	200
Water project	1125	1500	1875	1875
Totals for Agriculture 2075	1325	2100	2375	
Totals for Literacy 2900	1900	3200	3500	
NPO: Health				
Sector: Education				
Education Project	800	2400	2000	800
Water project	375	500	625	625
Totals for Education 1425	1175	2900	2625	
Sector: Agriculture				
Education Project	800	2400	2000	8
Water project	1125	1500	1875	1875
Totals for Agriculture 2675	1925	3900		
Totals for Heatlh 4100	3100	6800		
Totals for Est 7000	5000	10000		0

(Sum of all P Commitments for the activity assigned to the Est Region) * Sector Percentage/100) * NPO Percentage/100) = 2000 * 50/100 * 20/100 = 3000

Activity Details

Field Name	Value		Value	
Activity name	Education Project		Water project	
Sector	Education	Agriculture	Education	Agriculture
Sector Percentage	50	50	25	75
Region	Nord	Est	Nord	Est
Region	30	70	20	80
NPO	Literacy	Health	Lieracy	Health
NPO Percentage	20	80	50	50
Donor Funding				
Planned Commitments	3000	2000	4000	5000
Actual Commitments	4000	5000	5000	5000
Planned Disbursements	6000	6000	3000	4000
Actual Disbursements	2000	2000	2000	3000

Similar calculations will apply to other fields on the activity that are split by a percentage. For the Donor Reports these are:

- National Planning Objectives'
- Primary Program
- Secondary Program
- Primary Sector
- Primary Sub-Sector
- Primary Sector Sub-Sector
- Secondary Sector
- Secondary Sector Sub-Sector
- Executing agency (For Bolivia implementation only)
- Componente (For Bolivia Implementation only)

Fields that are not split by a percentage are

- Status
- A.C. Chapter
- Accession Instrument
- Financing Instrument
- Implementation Level
- Type Of Assistance
- Region
- Beneficiary Agency
- Implementing Agency
- Responsible Organization
- Activity Created By

Appendix E – Component Reports

Simple component report with no hierarchy

When creating a report with no hierarchy the user can select any of the columns that have been turned on in the Feature Manager for that AMP. As this is a regular component report with no grouping (hierarchy) of any kind the measures will be calculated as follows

Measure	Formula
Total Planned Commitments per activity	Sum of all the planned commitments in the component funding org section for an activity
Total Planned Disbursements per activity	Sum of all planned disbursements in the component funding section for an activity
Total Actual Commitments per activity	Sum of all Actual Commitments in the component funding section for an activity
Total Actual Disbursements per activity	Sum of all Actual Disbursements in the component funding section for an activity
Undisbursed Balance per activity	Total Actual Commitments per activity – Total Actual Disbursements per activity
Total Commitments (For Bolivia only)	Total Actual Commitments + Total Planned Commitments

This is how the report will appear in AMP

Project Title	Region	Sector	Funding				
			Actual disbursements	Planned Disbursements	Actual Commitments	Planned Commitments	Undisbursebed Balance
Report Totals			9000	19000	19000	14000	10000
Education Project	Est. Nord	Education Agriculture	4000	12000	9000	5000	5000
Water project	Est Nord	Education Agriculture	5000	7000	10000	9000	5000

2000 + 3000 = 5000

Activity Details

Field Name	Value		Value	
Activity name	Education Project		Water project	
Sector	Education	Agriculture	Education	Agriculture
Component	Technical Assistance	Infrastructure	Technical Assistance	Infrastructure
Regional Funding				
Planned Commitments	3000	2000	4000	5000
Actual Commitments	4000	5000	5000	5000
Planned Disbursements	6000	6000	3000	4000
Actual Disbursements	2000	2000	2000	3000

Report with 1 hierarchy

As the funding in component reports is split by the components it is always a good practice to create a hierarchy report with component name. The activities that do not have a component funding allocated will fall under "unallocated" section in a component report with component name as hierarchy. These activities will not display amounts as there is no component funding entered for these activities. Let's look at an example of a component report with component names as a hierarchy.

When creating component reports if one selects the component name as a hierarchy one can see the exact funding by that component. If you do not select the component name it is difficult to analyze how much of the funding is dedicated to each component type. Also when selecting component name as a hierarchy it is best to assign it as the top most hierarchy to get a complete picture of the funding by each type of component.

1 level hierarchy – component name as a hierarchy

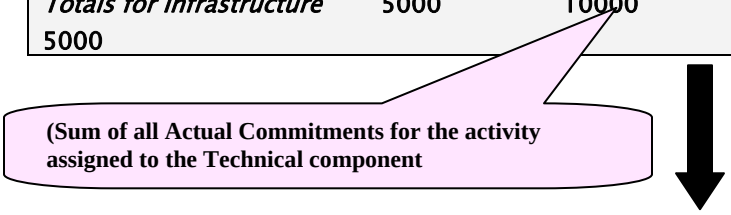
The report will split the funding based on the amounts entered under component funding. Here are the formulas for calculating funding amounts in these type of reports:

Measure	Formula
Total Planned Commitments per activity per component type	(Sum of all planned commitments for that activity in the component funding section per component type)
Total Actual Commitments per activity per component type	(Sum of all Actual commitments for that activity in the component funding section per component type)
Total Actual Disbursements per activity per component type	(Sum of all Actual disbursements for that activity in the component funding section per component type)
Total Planned Disbursements per activity per component type	(Sum of all Planned Disbursements for that activity in the component funding section per component type)
Undisbursed Balance per activity per component type	(Total Actual Commitments per activity per region) – Total component funding section per component type)
Total Commitments per activity per component type (For Bolivia only)	Total Actual Commitments + Total Planned Commitments component funding section per component type

Given below is an example of how the report will break down the amounts per component type for that activity

Project Title	Funding

	Actual disbursements	Planned Disbursements	Actual Commitments	Planned Commitments	Undisbursebed Balance
Report Totals	9000	19000	19000	14000	10000
Technical					
Education Project	2000	6000	4000	3000	2000
Water project	2000	3000	5000	4000	3000
Total for Technical 5000	4000	9000	9000		7000
Infrastructure					
Education Project	2000	6000	5000	2000	3000
Water project	3000	4000	5000	5000	2000
Totals for Infrastructure 5000	5000	10000	10000		7000



Activity Details

Field Name	Value		Value	
Activity name	Education Project		Water project	
Sector	Education	Agriculture	Education	Agriculture
Sector Percentage	50	50	25	75
Component	Technical Assistance	Infrastructure	Technical Assistance	Infrastructure
Regional Funding				
Planned Commitments	3000	2000	4000	5000
Actual Commitments	4000	5000	5000	5000
Planned Disbursements	6000	6000	3000	4000
Actual Disbursements	2000	2000	2000	3000

2 level hierarchy – component name and sector as hierarchy

As the sector is not tied to a particular component the amounts will be split by sector for component.

Measure	Formula
Total Planned Commitments per activity per sector per component type	(Sum of all planned commitments for that activity in the component funding section per component) * sector percentage/100
Total Actual Commitments per activity per sector per component type	(Sum of all Actual commitments for that activity in the component funding section per component) * sector percentage/100
Total Actual Disbursements per activity per sector per component type	(Sum of all Actual disbursements for that activity in the component funding section per component)* sector percentage/100
Total Planned Disbursements per activity per sector per component type	(Sum of all Planned Disbursements for that activity in the component funding section per component)* sector percentage/100
Undisbursed Balance per activity per sector component type	(Total Actual Commitments per activity per region) – Total component funding section per component)* sector percentage/100

Given below is an example of how the report will break down the amounts per sector for every component type for that activity. Given below are examples of two activities and a sample of how the report will break down the amounts per sector per component type for these activities

Project Title	Funding				
	Actual disbursements	Planned Disbursements	Actual Commitments	Planned Commitments	Undisbursed Balance
Report Totals	9000	19000	19000	14000	10000
Component: Technical					
Sector: Education					
Education Project	1000	3000	2000	1500	1000
Water project	500	750	1250	1000	750
Totals for Education	1500	3750	3250	2500	1750
Sector: Agriculture					
Education Project	1000	3000	2000	1500	1000
Water project	1500	2250	3750	3000	2250
Totals for Agriculture	2500	5250	5750	4500	

3250					
Totals for Technical 5000	4000	9000	9000	7000	
Component: Infrastructure					
Sector: Education					
Education Project	1000	3000	2500	1000	1500
Water project	750	3000	1250	1250	500
Total for Education 2000	1750	6000	3750	2250	
Sector: Agriculture					
Education Project	1000	3000	2500	1000	1500
Water project	2250	1[illegible]0	3750	3750	1500
Total for Agriculture 3000	325[illegible]	4000	6250	4750	
Total for Infrastructure 5000		10000	10000	7000	

(Sum of all Planned Disbursements for the activity assigned to the Technical Component * Sector Percentage/100 = 6000 * 50/100 = 3000

Activity Details

Field Name	Value		Value	
Activity name	**Education Project**		**Water project**	
Sector	**Education**	**Agriculture**	**Education**	**Agriculture**
Sector Percentage	**50**	**50**	**25**	**75**
Region	**Nord**	**Est**	**Nord**	**Est**
Region Percentage	**50**	**50**	**75**	**25**
Component	**Technical**	**Infrastructure**	**Technical**	**Infrastructure**
Donor Funding				
Planned Commitments	**3000**	**2000**	**4000**	**5000**
Actual Commitments	**4000**	**5000**	**5000**	**5000**
Planned Disbursements	**6000**	**6000**	**3000**	**4000**
Actual Disbursements	**2000**	**2000**	**2000**	**3000**

3 level hierarchy – component name/sector – National Program as hierarchy

As the sector and the national program are not tied to a particular component type the regional amounts will be split by sector and by national plan for every component type.

Measure	Formula
Total Planned Commitments per activity per region per sector per national program per component type	((Sum of all planned commitments for that activity in the component funding section per component type) * sector percentage/100) * National Program percentage/100)
Total Actual Commitments per activity per region per sector per national program per component type	((Sum of all Actual commitments for that activity in the component funding section per component type) * sector percentage/100) * National Program percentage/100)
Total Actual Disbursements per activity per region per sector per national program per component type	((Sum of all Actual disbursements for that activity in the component funding section per component type) * sector percentage/100) * National Program percentage/100)
Total Planned Disbursements per activity per region per sector per national program per component type	((Sum of all Planned Disbursements for that activity in the component funding section per component type) * sector percentage/100) * National Program percentage/100)
Undisbursed Balance per activity per region per sector per national program per national program per component type	((Total Actual Commitments per activity component funding section per component type) – Total Actual Disbursements per activity per component funding section per component type) * sector percentage/100) * National Program percentage/100)

Given below is an example of how the report will break down the amounts per sector per national plan for every component type for that activity

	Actual disbursements	Planned Disbursements	Actual Commitments	Planned Commitments
Report Totals	9000	19000	19000	14000
Component: Technical				
NPO: Literacy				
Sector: Education				
Education Project	200	600	400	300
Water project	375	375	625	500
Totals for Education 800	575		975	1025
Sector: Agriculture				
Education Project	200	600	400	300
Water project	1125	1125	1875	1500
Totals for Agriculture 1800	1325		1725	2275
Totals for Literacy 2600	1900		2700	3300
NPO: Health				

Sector: Education				
Education Project	800	2400	1600	1200
Water project	250	375	625	500
Totals for Education	1050	2775	2225	1700
Sector: Agriculture				
Education Project	800	2400	1600	1200
Water project	250	1125	1875	1500
Totals for Agriculture	1050	3525	3475	2700
Totals for Heatlh	2100	6300	5700	4400
Totals for Technical	4000	9000	9000	7000
Component: Infrastructure				
NPO: Literacy				
Sector: Education				
Education Project	200	600	500	200
Water project	375	500	625	625
Totals for Education	575	1100	1125	825
Sector: Agriculture				
Education Project	200	600	500	200
Water project	1125	1500	1875	1875
Totals for Agriculture	1325	2100	2375	2075
Totals for Literacy	1900	3200	3500	2900
NPO: Health				
Sector: Education				
Education Project	800	2400	2000	800
Water project	375	500	625	625
Totals for Education	1175	2900	2625	1425
Sector: Agriculture				
Education Project	800	2400	2000	800
Water project	1125	1500	1875	1875
Totals for Agriculture	1925	3900	3	2675
Totals for Heatlh	3100	6800		4100
Totals for Infrastructure	5000	10000		7000

(Sum of all Planned Commitments for the activity assigned to the Infrastructure Component Type) * Sector Percentage/100) * NPO Percentage/100) = 2000 * 50/100 * 20/100 = 3000

Activity Details

Field Name	Value		Value	
Activity name	Education Project		Water project	
Sector	Education	Agriculture	Education	Agriculture
Sector Percentage	50	50	25	75
Component	Technical	Infrastructure	Technical	Infrastructure
NPO	Literacy	Health	Literacy	Health
NPO Percentage	20	80	50	50
Donor Funding				
Planned Commitments	3000	2000	4000	5000
Actual Commitments	4000	5000	5000	5000
Planned Disbursements	6000	6000	3000	4000
Actual Disbursements	2000	2000	2000	3000

Similar calculations will apply to other fields on the activity that split funding by percentage. For the Donor Reports these are:

- National Planning Objectives'
- Primary Program
- Secondary Program
- Primary Sector
- Primary Sub-Sector
- Primary Sector Sub-Sector
- Secondary Sector
- Secondary Sector Sub-Sector
- Executing agency (For Bolivia implementation only)
- Componente (For Bolivia Implementation only)

Fields that do not split funding by a percentage are

- Status
- A.C. Chapter
- Accession Instrument
- Financing Instrument
- Implementation Level
- Type Of Assistance
- Region
- Beneficiary Agency
- Implementing Agency
- Responsible Organization
- Activity Created By
- Component Name

[i] This Feature was used in the implementation Done for Bolivia